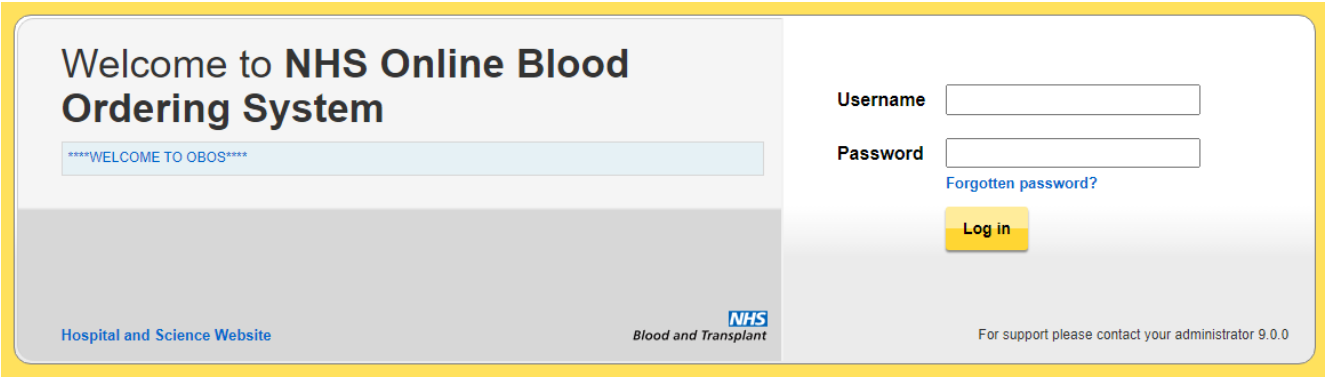
Online Blood Ordering System (OBOS)



This User Guide is applicable to OBOS versions numbered 9.X.X

Changes to this document are in **purple**

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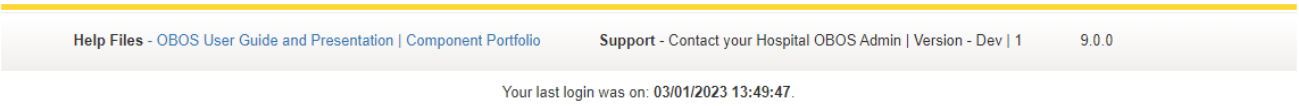
Introduction [back to top]

The on-line blood ordering system (OBOS) has been developed by NHSBT, hospitals and external suppliers to enable hospitals to order blood components online. Orders placed in this way will go directly into the NHSBT computer system, Pulse and hospitals will be able to view the progress of their orders within NHSBT.

The OBOS "footer" includes a link to the corresponding OBOS User Guide and Presentation along with the NHSBT component portfolio.
The "footer" indicates which version of OBOS has been accessed, which system e.g., Live or Training and the date and time of your last log in (UAT is the NHSBT user acceptance testing site).



If you have any queries regarding the use of OBOS in your hospital, please contact your hospital administrator or transfusion laboratory manager.

Any comments or feedback on the system or this user guide are welcomed as they allow us to continually develop to meet user needs and can be sent to OBOS@nhsbt.nhs.uk

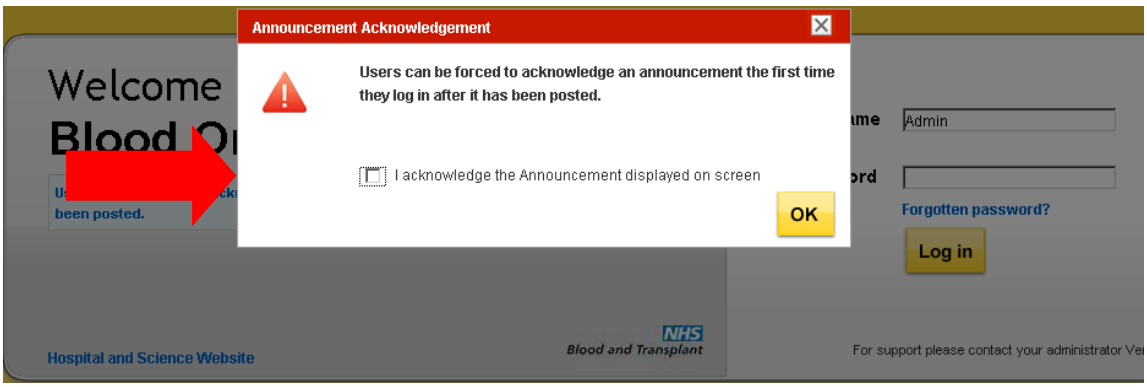
Please Note: be aware of the normal functionality of the computer mouse scroll wheel. The functionality varies slightly depending on which internet browser version you are using. It is important that you do not inadvertently change a selection for any of the drop-down menus using the mouse scroll wheel – **check all selections before selecting "Send order".**

OBOS is designed to work on desktop PC's as well as mobile devices. Due to this responsive design and the various screen sizes available on phones and tablets you will notice changes to the layout. All functions are still available and perform in the same way to previous versions.

Logging onto OBOS [back to top]

Once you have connected to the web service the log in screen shown below will appear. On the left, there is an area where any announcements from NHSBT will be shown and on the right are the boxes to type in your username and password.

NHSBT can set up announcements so that the first time a user logs in after an announcement has been posted they must acknowledge it.

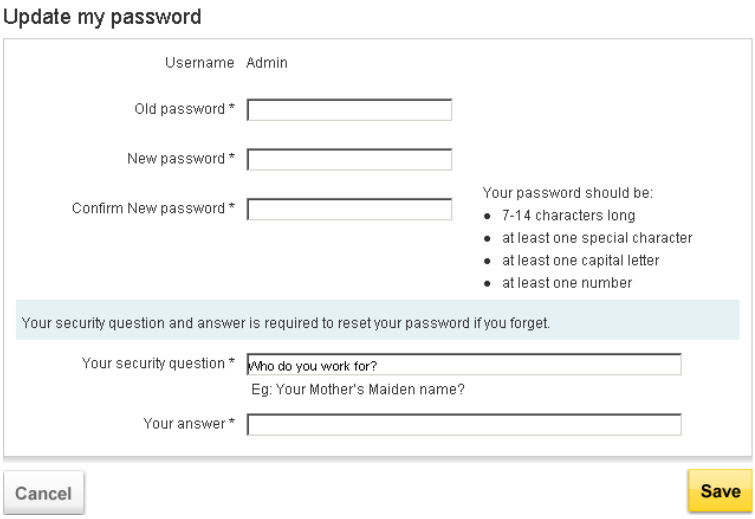


Underneath the announcements area, there is a direct link to the Hospital and Science website where you can access additional OBOS training materials.

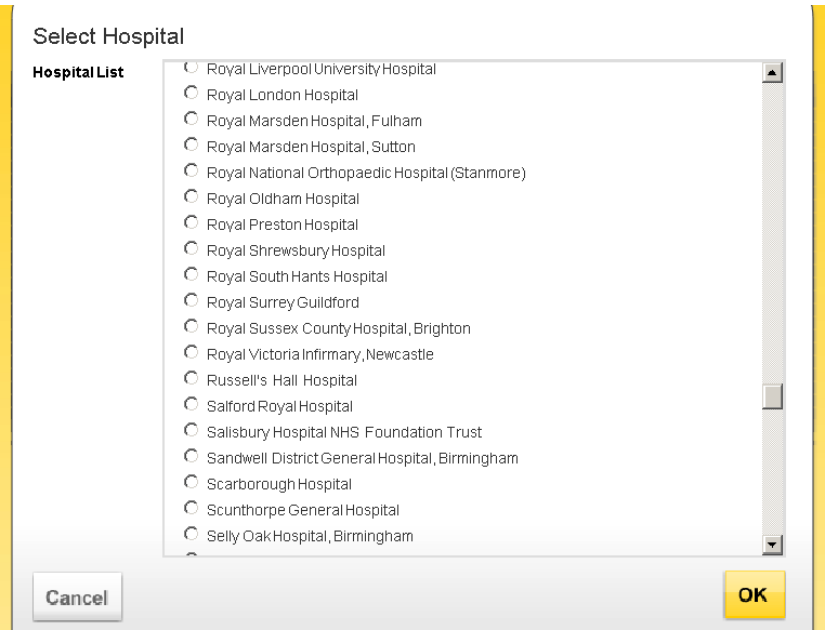
When your account is set up your username and password will be sent to you via e-mail.

If you forget your password, please see the Forgotten Password section

When you log onto OBOS for the first time the screen shown below will appear and you will be asked to change your password and set up a security question. Both passwords and security question answers are case sensitive. Rules apply to passwords, and these are listed on the screen.

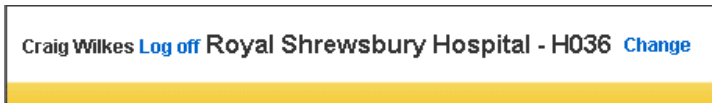


If your account is set up for multiple hospitals, you may need to select the hospital you wish to order for and click on OK as shown below.



Alternatively, one hospital may have been set up as your default location in which case you will be taken straight to the home page for that hospital.

The top line of the OBOS screens contains information on your name and the hospital you are currently viewing/placing orders for, log off facility and the ability to switch to any other hospital site you have access to.



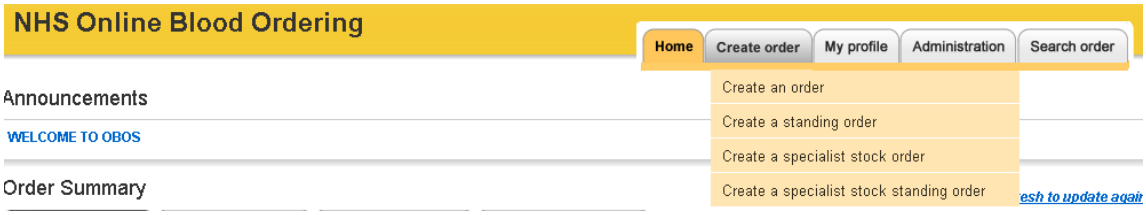
Quick system overview [back to top]

There are different types of accounts available, the different access levels for each account type will dictate which functions are available and which tabs will appear.

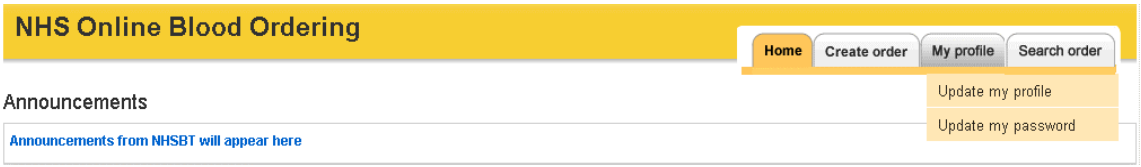
Hospital Administrator - Create/Activate/Deactivate/Unlock accounts, reset passwords and Create/Amend/Delete/Search and Reconcile orders.
Hospital User - Create/Amend/Delete/Search and Reconcile orders.
Reconciliation user - Search and Reconcile orders only.
NHSBT administrator – Access all areas.
NHSBT user – Create/Activate/Deactivate/Unlock accounts, reset passwords and add announcements.
NHSBT announcement user – add announcements.

The homepage contains order summary screens for current, draft, standing and queued orders.

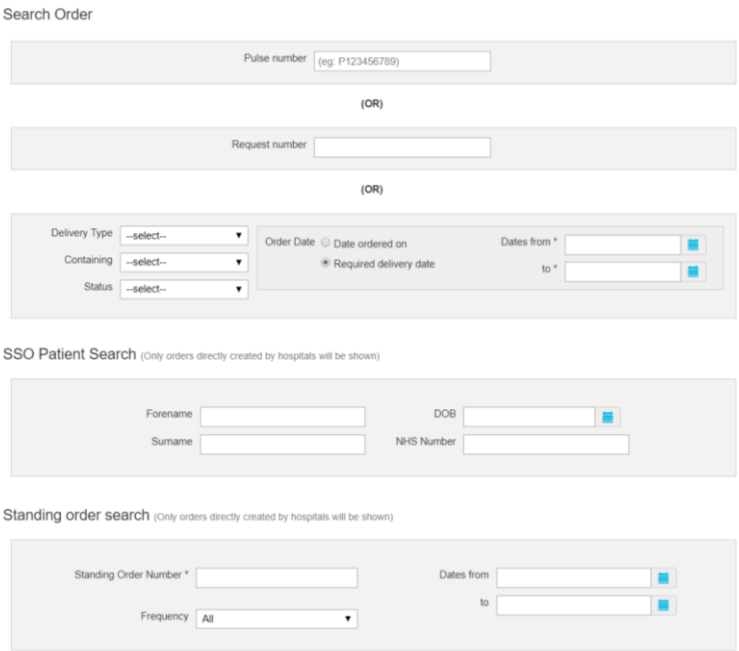
The “create order” tab has four options, Create an order, Create a standing order, Create a specialist stock order, Create a specialist stock standing order.



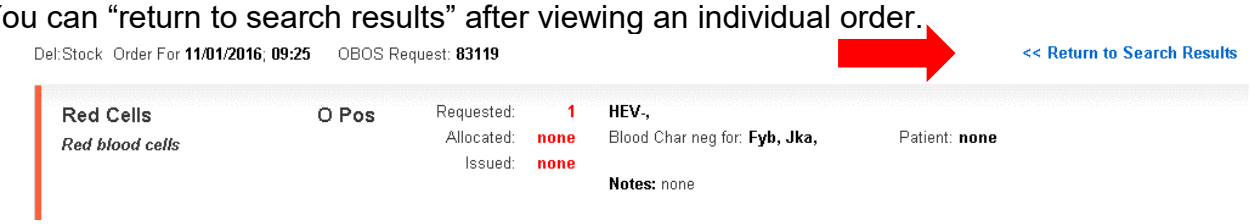
All accounts can access the “my profile” to update your profile or password



The “search order tab” allows you to search for orders.



You can "return to search results" after viewing an individual order.



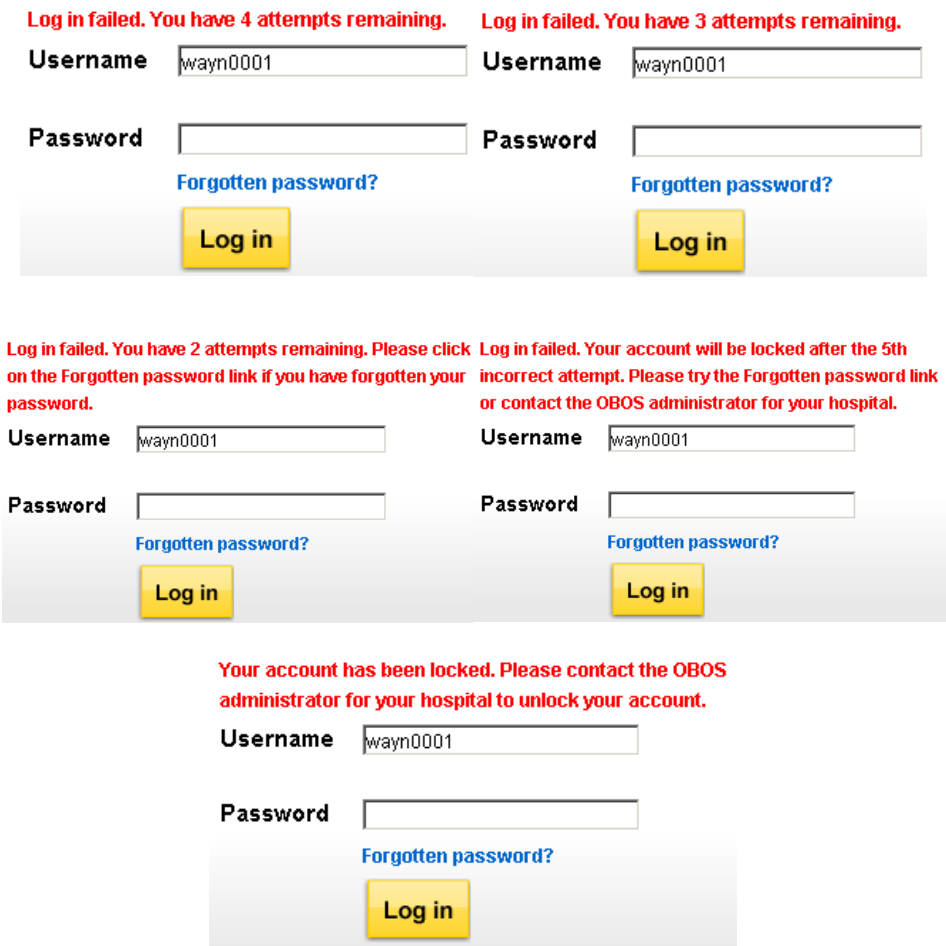
Logging Off [back to top]

There is an automatic 'time out' after 20 minutes. Your session will be discontinued, and you will be returned to the login screen.

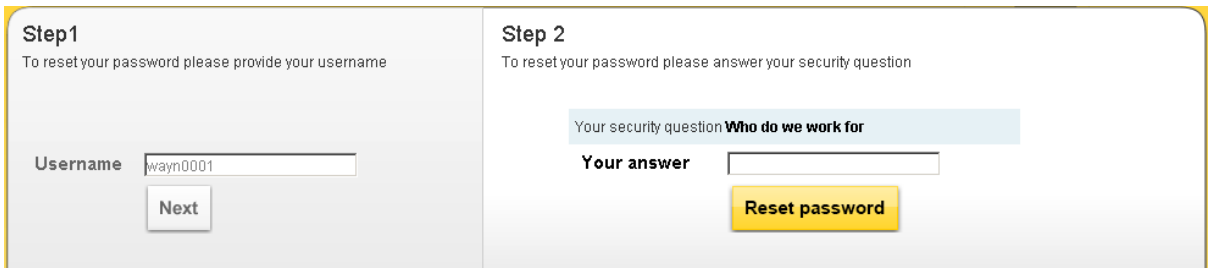
To log off at any time click on 'Log Off 'after your name in the top left of any OBOS screen.

Forgotten passwords/password expiry [back to top]

If you try to log in using the incorrect password you have four attempts, on the fifth incorrect attempt the account will be locked. The following prompts are displayed to indicate the remaining attempts. Once locked, your account can be unlocked by your hospital OBOS administrator account holder(s).



On the log in screen “forgotten password?” appears in blue on the right-hand side, if selected you will be asked to enter your username, your security question will appear and when answered you can re-set your password. A new password will be sent to the e-mail address associated with the account. If you cannot remember your security answer you will need to contact **your** hospital administrator to re-set your password.

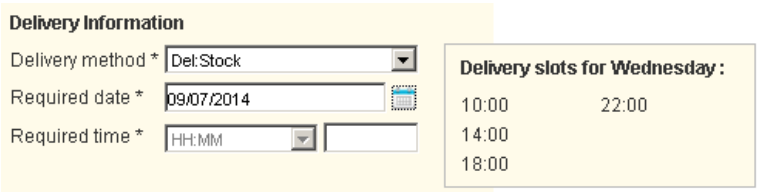


Placing an order using OBOS [back to top]

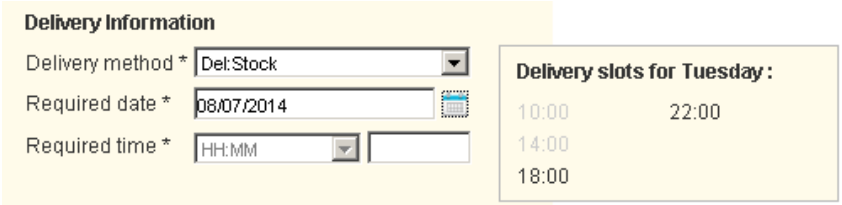
Delivery type/day/time

From the home screen select the create order option and select the delivery method required (the default is >blank<) Select the delivery date required by clicking on the calendar icon and highlighting the date required or type the date into the required date box in the format dd/mm/yyyy.

Del Stock for a routine delivery.
A ‘delivery slot matrix’ will be presented with the delivery times for that day.



If you choose a delivery for the same day, you are placing the order you may find that a delivery slot is ‘greyed out’, even though that time has not passed, this is due to the cut off time for that slot has passed.



Ad hoc for an additional non-scheduled delivery.

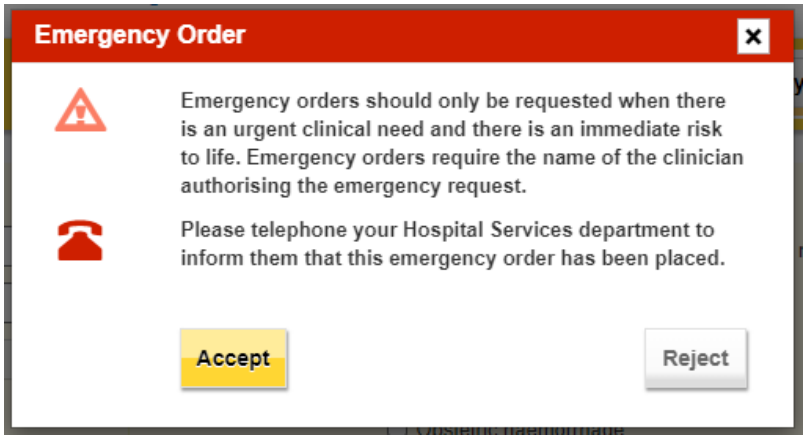
Select the delivery date required by clicking on the calendar icon and highlighting the date required or type the date into the required date box in the format dd/mm/yyyy.
The time will be auto populated based on the Current time + pick and pack time + delivery time. This is the **earliest** NHSBT could deliver that order.

Collect and **Emergency Collect**
Select the delivery date required by clicking on the calendar icon and highlighting the date required or type the date into the required date box in the format dd/mm/yyyy. The time will be auto populated based on the Current time + pick and pack time.

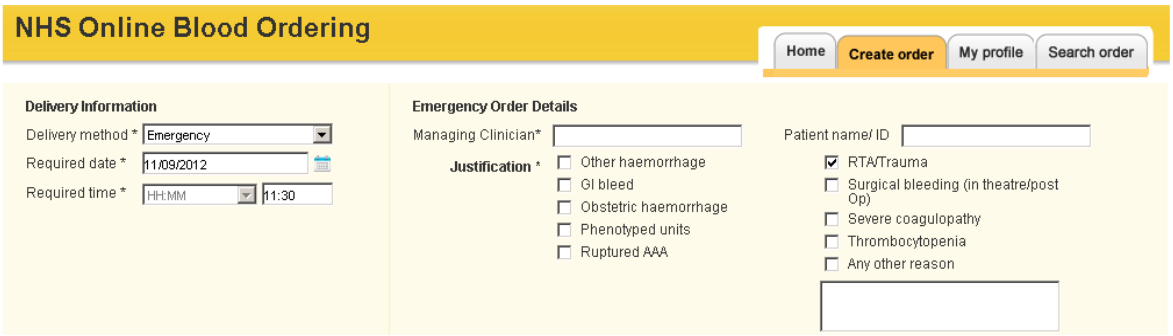
Emergency

Select the delivery date required by clicking on the calendar icon and highlighting the date required the time will be auto populated based on the current time + pick and pack time + emergency delivery time

If you request an emergency delivery, users must accept the conditions shown below to proceed and **must** telephone their Hospital Services department to inform them that the order has been placed.



Additional information will be requested as shown on the screen below. Enter the name of the requesting clinician, click on one of the justifications for a blue light delivery (the system will only allow you to select one). If selecting other, type the reason into the free text box.



If selecting a date over 15 days in advance the following warning message will be shown:

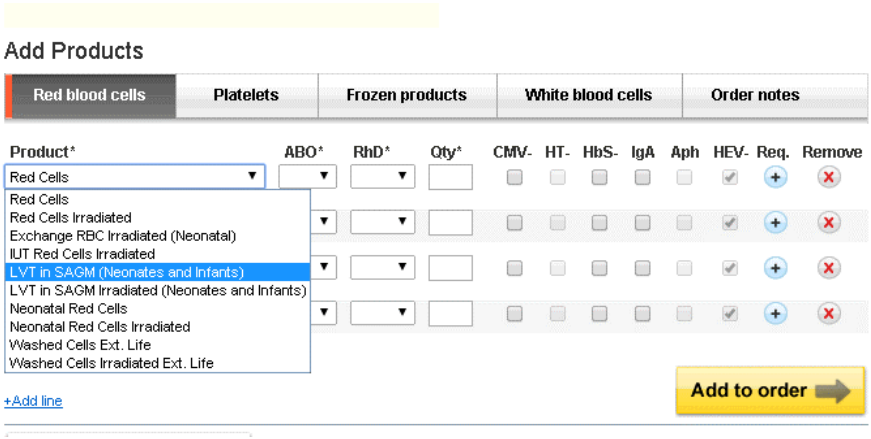
In all cases, above, **the suggested time**, can be over typed by the user for a time more suited to their needs.
This will result in the order obtaining a new delivery type of 'OBOS Late', upon seeing this delivery type the Hospital Services user will be prompted to contact the requesting hospital to decide which delivery type is required to fulfil the order (Del: Stock, Ad Hoc, Emergency etc.)

Please use the time you require the delivery to arrive at your location, not the time it leaves NHSBT or the time you are placing the order.

NOTE: *Please be aware that if you start to populate an order and it is not completed within 5 minutes causing you to miss the cut off time for that order it will automatically convert to an OBOS Late order. It is recommended that the product selection is completed first with the delivery type and time second.*

Component Selection

Select the component type required by clicking on the red cell, platelet, frozen products or white blood cells tabs under 'add products'. The order notes tab on this line contains a free text box to add information that applies to the whole order. Enter the product required from the drop-down list as shown below.

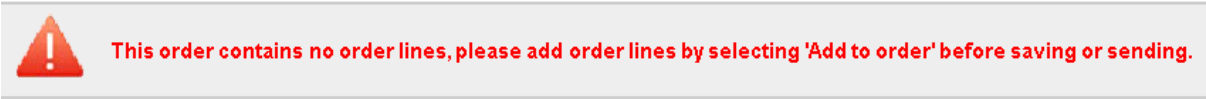


For red cells and platelets, the default product will be the standard component and will appear at the top, followed by the standard irradiated component. The rest of the list will be in alphabetical order.

Select the ABO and Rh requirements from the drop-down lists and enter a quantity in the Qty* box as shown below. Additional requirements for CMV, HT, HbS, IgA and Apheresis (Aph) can be added by checking the boxes available. Please be aware that some of these components will be in short supply and should only be requested when necessary. For some components where these requirements form part of the product specification these boxes may be greyed out and ticked.
Where an option is not available the box will be greyed out e.g., HT for group AB FFP.

Any additional requirements such as phenotyped red cells and date required for platelets can be added using the supplementary screens provided by clicking on the req. button . These screens are described later in this section.

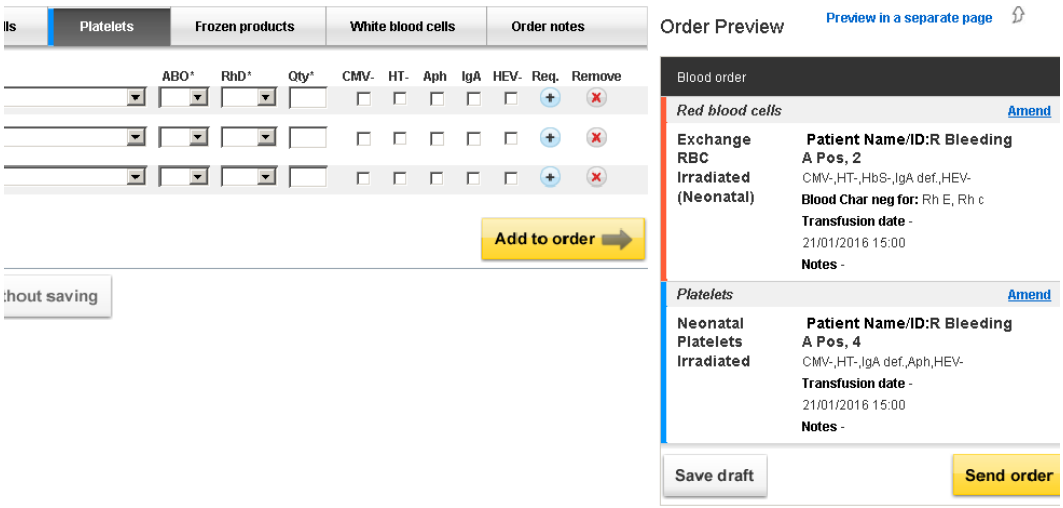
The error message below will be displayed if a user attempts to send or save an empty order.



After selecting your required component and completing the necessary fields; ABO, Rh, quantity and additional requirements – the request line is complete and can be added to the order by clicking on the Add to order button. Add to order

The information for that request line is then shown in the order preview area as shown on the right-hand side in the example below. If the information is incorrect then it can be amended by clicking on the blue 'Amend' in the order preview screen. The individual component will then be returned to the 'add products' section and can then be amended by selecting the correct information or removed by clicking on the remove button .

NOTE: Items on the left-hand side will NOT be sent, all items must be included on the right-hand side.



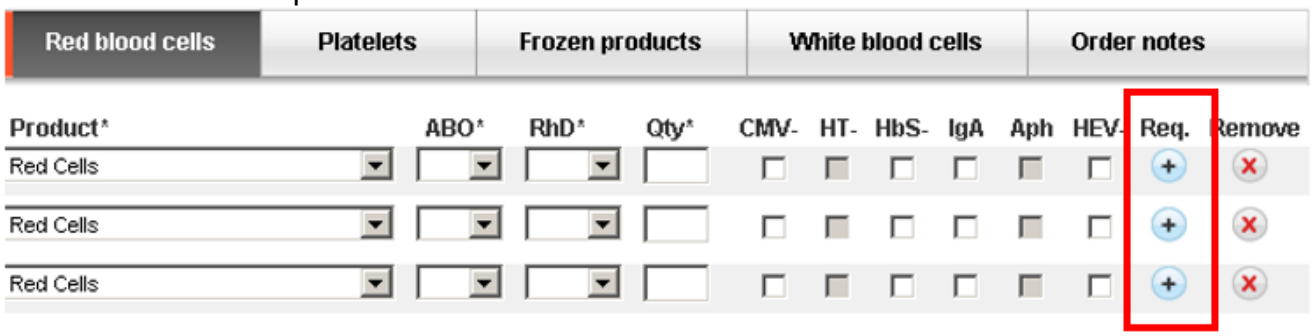
Continue to add components as required. If additional lines are required, this can be added by clicking on the blue '+Add line' to the left of the yellow 'Add to order' button. Different component types can be added to the same order.

To make it easy to identify component types in the order preview area each different component type has a stripe to the left of it in a different colour in the order preview area as shown above. Red cells have a red stripe, platelets blue, frozen products yellow and white blood cells grey.

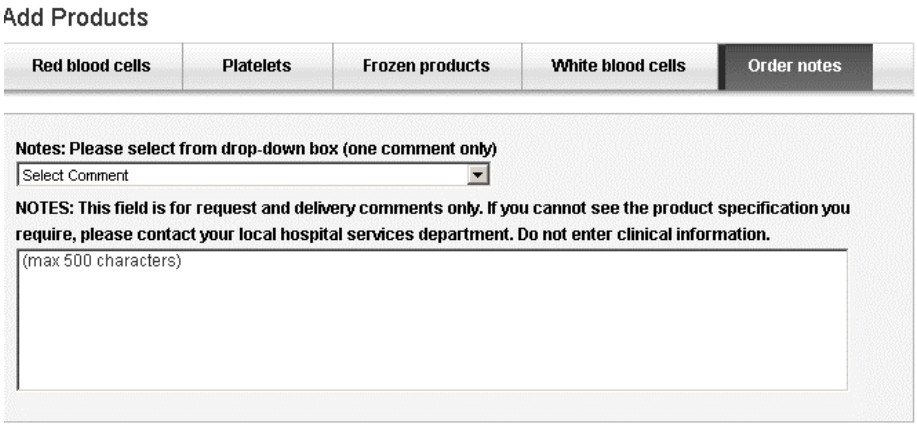
Line and Order Notes [back to top]

† **Please Note: Free text note sections for individual and overall orders should only be used for supporting information.**
Product characteristics such as phenotype requirements and transfusion dates should not be placed in these fields. Please use the tick boxes and dedicated fields for such requirements.

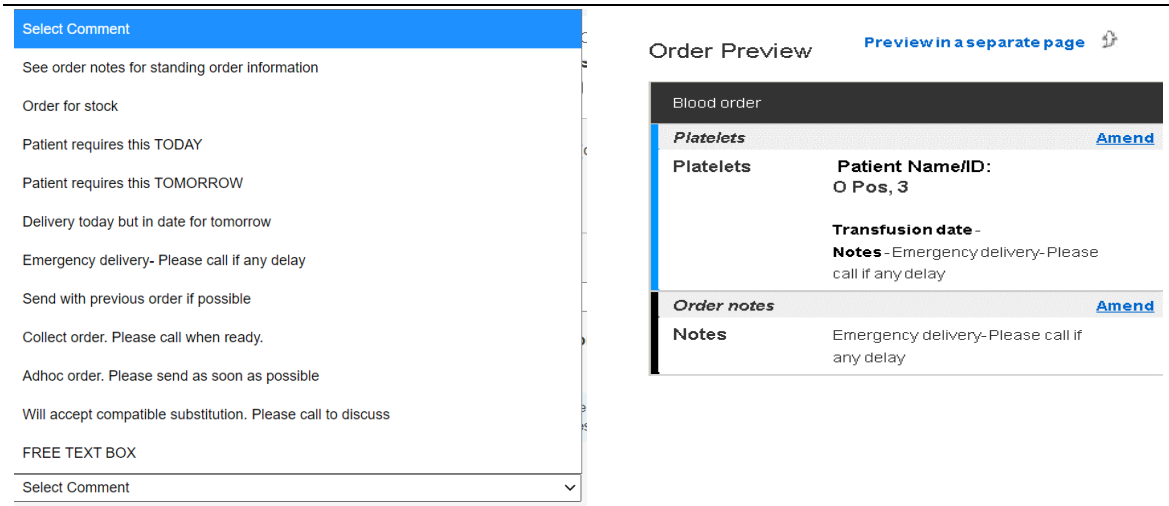
Additional notes for each order line are available in the 'Req.' screens. By clicking on the 'Req.' button a new screen opens which allows additional information to be added specific to each product type. Once data has been added, this screen can be minimised again by clicking on the under Req.



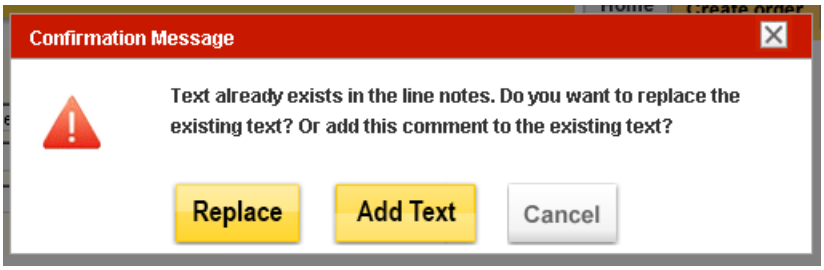
Order notes† may be added for the whole order using the order notes tab as shown below. Notes entered here will apply to the **whole order**.



If the line or whole order requires additional notes select the most appropriate note from the drop-down list, these can then be added to the order and submitted.



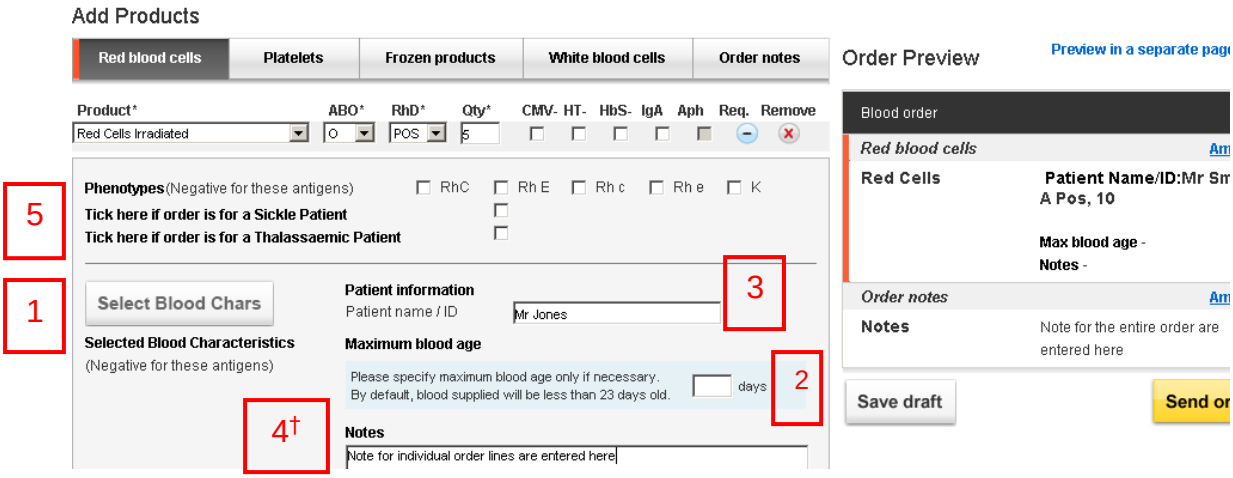
The comment can be amended or if appropriate an additional comment can be added. If changes are required once added to the order, select amend and the details will move to the left-hand side of the screen. Select the changes required and the below options to 'Replace' the comment or 'Add Text' to add additional comment(s) will be displayed.



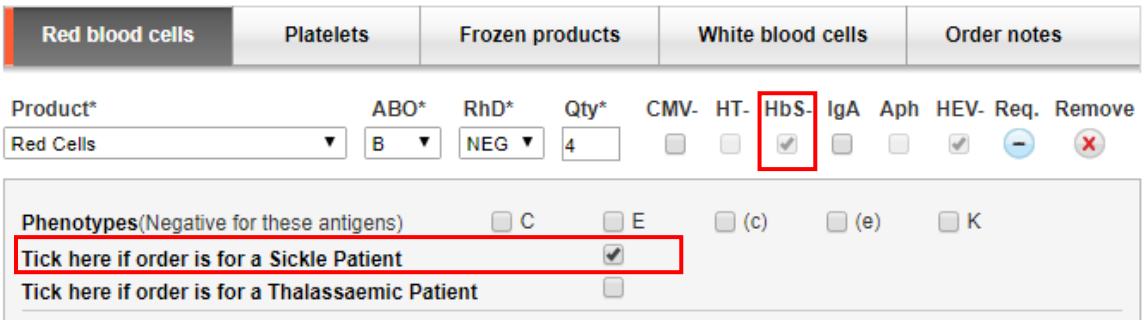
By clicking on the 'Req.' button a new screen opens which also allows additional information to be added specific to each product type

Additional information on this screen:

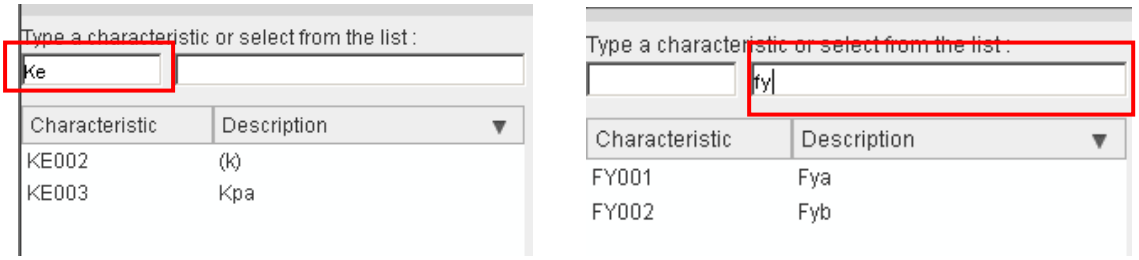
1. Select Blood Characteristics
2. Maximum blood age
3. Patient information (Do not include clinical information. This information will be transmitted within the EDN (Electronic Dispatch Note) data.)
4. Notes (specific to the order line) †
5. Tick here if order is for a
   - Sickle Patient (selecting this box will automatically select the HbS- box)
   - Thalassaemic Patient



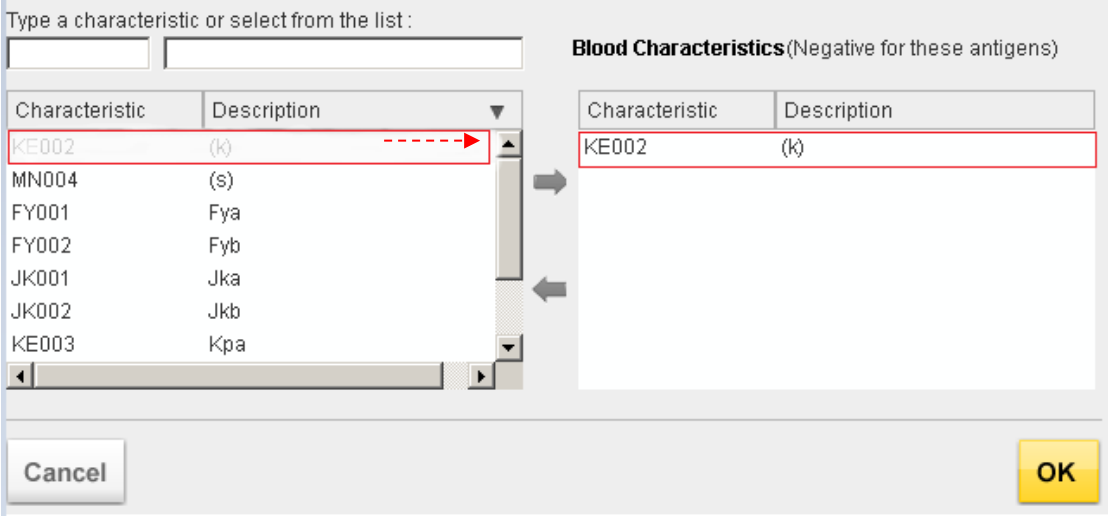
Selecting the sickle cell patient option (red box 5) will automatically select the HbS- box and the user will be unable to untick this whilst the sickle cell patient remains selected. If unticked HbS- will remain ticked.



Clinically significant red cell phenotypes can be selected as negative for specific antigens from the “Phenotypes” row or by clicking on “Select Blood Chars”. This will open the phenotypes ‘pop-up’ box. You can search by either blood char code or blood char description



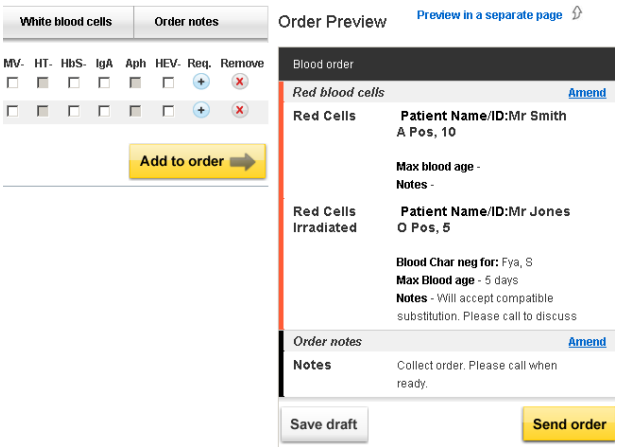
Select the phenotype you require in the left-hand pane, then click the icon to move it across to the right-hand panel.



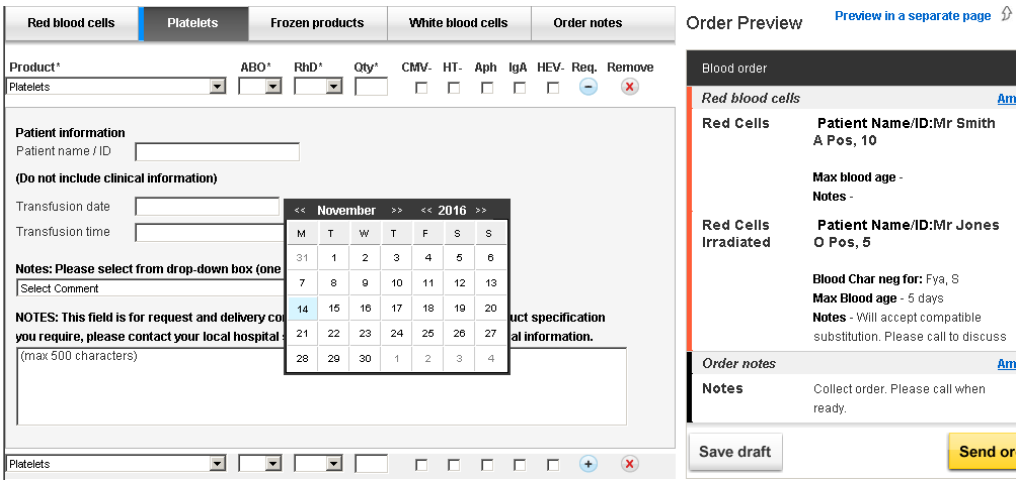
Patient information sections are free text.
Max blood age is the maximum age in days that are acceptable e.g., entering 6 indicates blood less than 7 days old is required. **This should only be requested when there is clinical need.** Do not enter a max age for components where max age is part of the component specification e.g., the shelf life for exchange units is always within 5 days of the bleed date.

Once the 'add to order' button is clicked any additional information entered will also be displayed in the order preview.

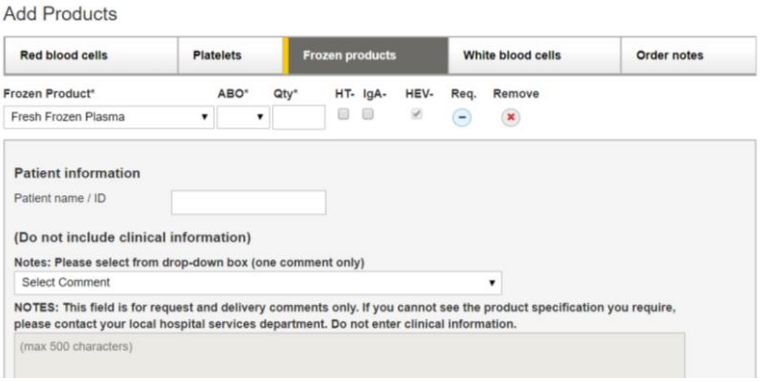
The screen below shows two order lines, one for 10 A+ red cells and one for 5 O+ red cells irradiated with additional phenotype requirements (i.e., negative for Fya and S) and a maximum age of 5 days.



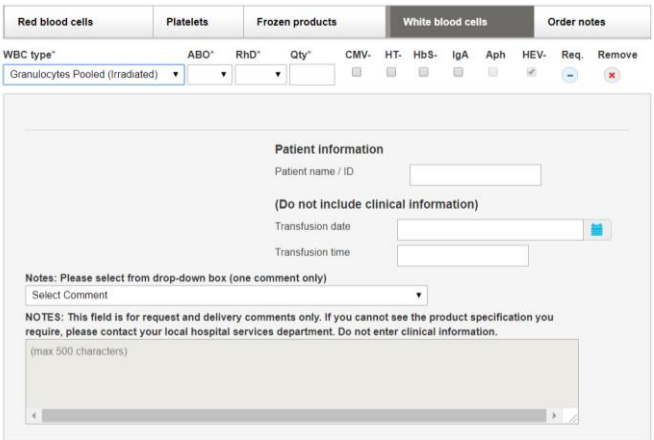
The requirements screens are different for each component type. For platelets there is the option to enter a patient name or ID. Please refer to Trust policy on providing patient identification data and note that the patient's name or ID entered will appear on the dispatch note and, in the EDN, (Electronic Dispatch Note) data file. A transfusion date and time can be entered. If you enter a date, you must enter a time and vice versa. Entering the transfusion date and time prevents the issue of platelets that go out of date before the time required.



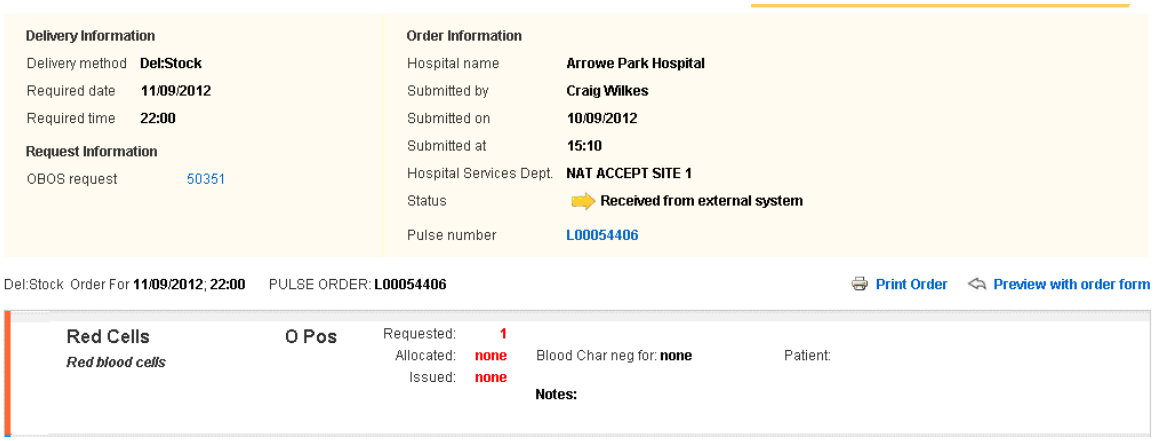
No Rh type needs to be entered for frozen components as all requests will default to Rh pos when added to the order but Rh neg components may be supplied by NHSBT. Substitution will be automatic and will not be accompanied by a telephone call. All other substitutions will be accompanied by a telephone call. For frozen components the requirements option only offers the option to record a patient name and free text as shown below.



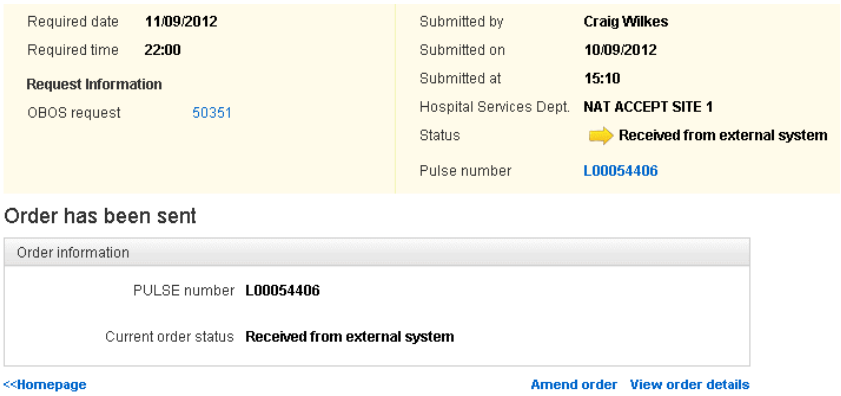
For granulocytes the additional requirements screen shown below appears and allows patient information, transfusion date and time and notes to be added.



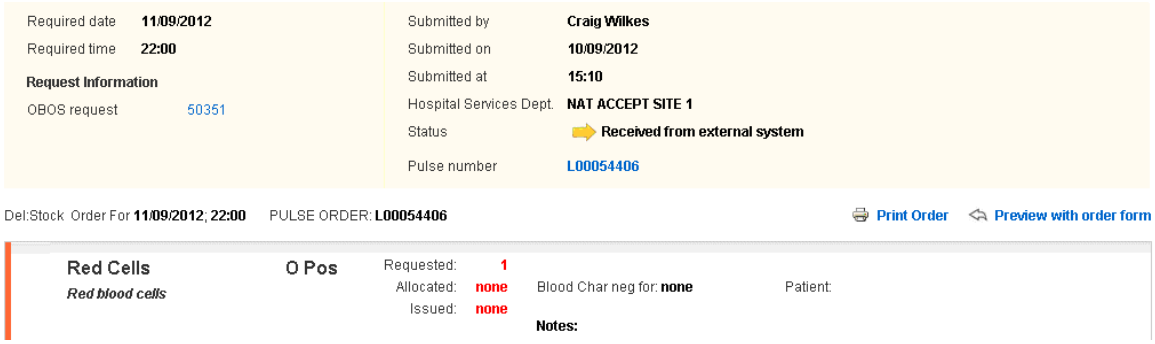
At any point by clicking on 'preview in a separate page', it is possible to view the order in a separate window as shown below. Return to the order screen by clicking on 'preview with order form' in blue on the right-hand side of the screen.



Once an order is complete it can then be sent to NHSBT by clicking on the **Send order** button. An order confirmation will be received also shown below. This will display both the OBOS request number and the Pulse order number. The blue OBOS request and Pulse numbers are active links.



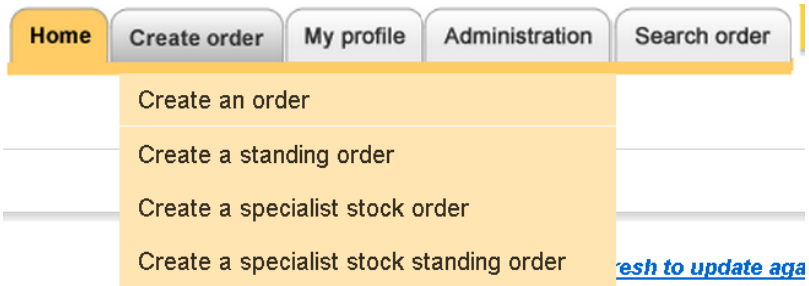
From the confirmation screen, you can click on 'view order details' at the bottom right-hand side to check the details as shown below. This screen also has a print order option, which can be used to print out a copy of an OBOS order and fax to Hospital Services if the link between OBOS and Pulse is not working.



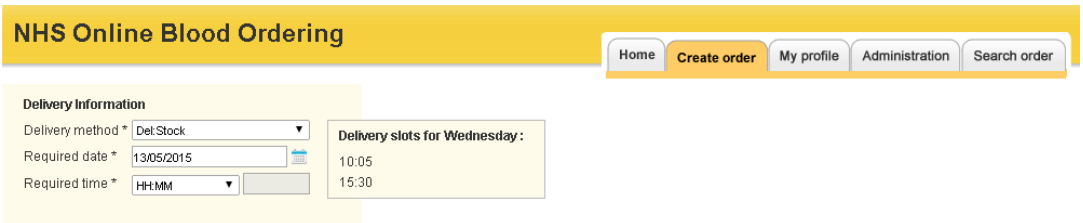
Placing an SSO (Specialist Stock Order) [back to top]

NOTE: Ordering HLA/HPA selected products via the SSO tab is only permitted for follow up requests for patients approved to receive these products. For first time orders please contact your NHSBT H&I laboratory.

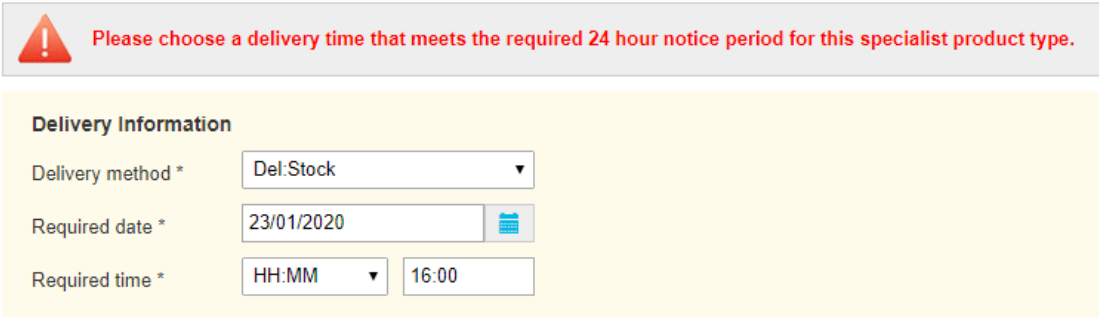
From Create Order tab select the 'Create a specialist stock order' option



Complete the delivery method, required date and time as shown in Placing an order using OBOS.



If there is less than 24 hours' notification (Del: Stock or Collect) and 8 hours' notification (Adhoc) is given between the time order is placed and the required delivery time the user will be shown a warning message. The user will be required to alter the delivery time before the order can be submitted.



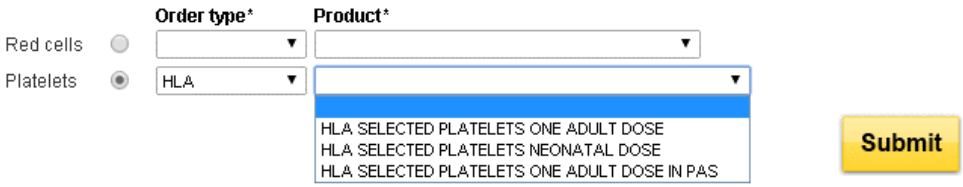
Select either red cells or platelets

The 'Order type' drop down menus are restricted to the type of product available.

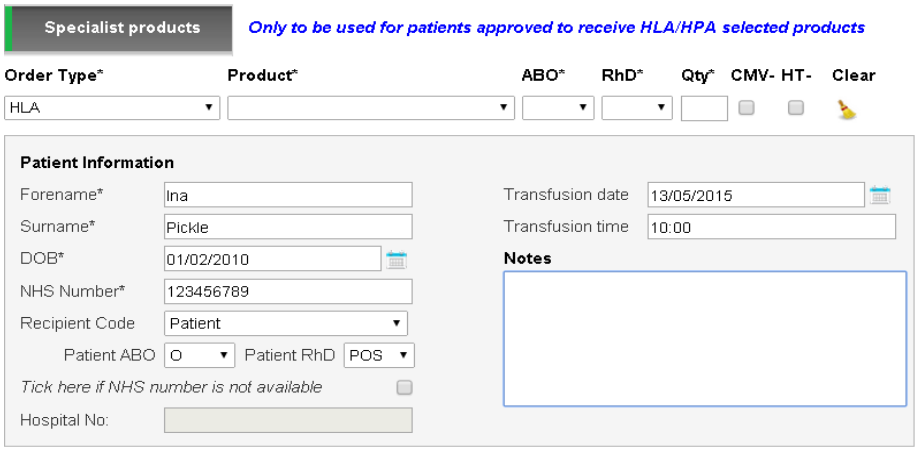
- HPA for red cells

- HLA, HPA or HLA/HPA for platelets

From the 'Product' menu select the product type requested, and press Submit

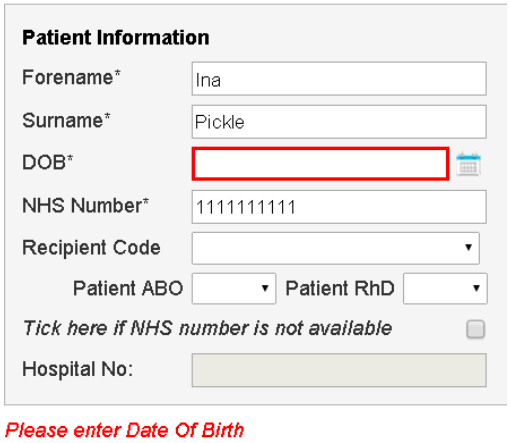


You will see the message below when you press the Submit button highlighting the need for advance notice of orders. Select OK to proceed



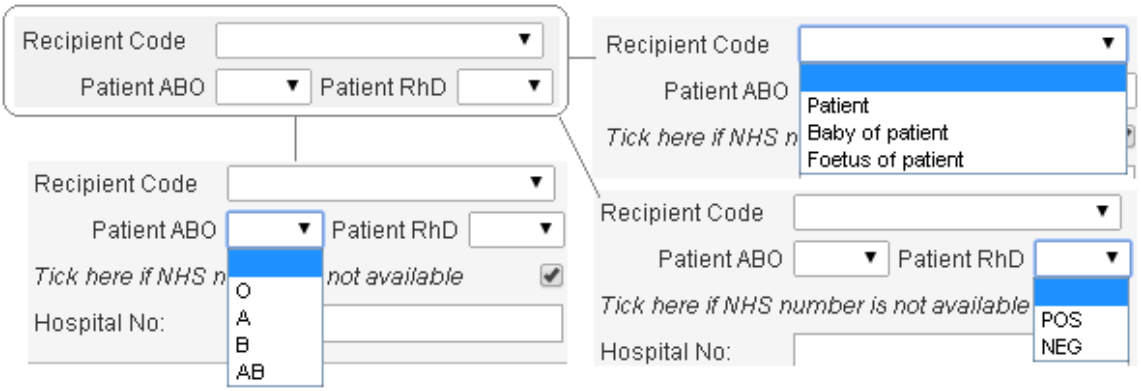
Mandatory fields are marked *
Order Type
Product
ABO
RhD
Qty
Fore/Surname
DOB
NHS **or** Hospital number

The NHS number is preferred as this is unique to the patient. If the patient does not have an NHS number tick the box stating it is not available and supply the Hospital number. Other fields are not mandatory but beneficial.

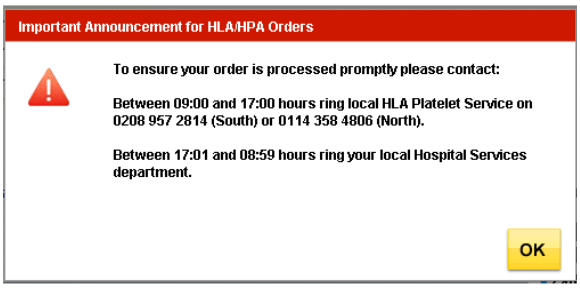


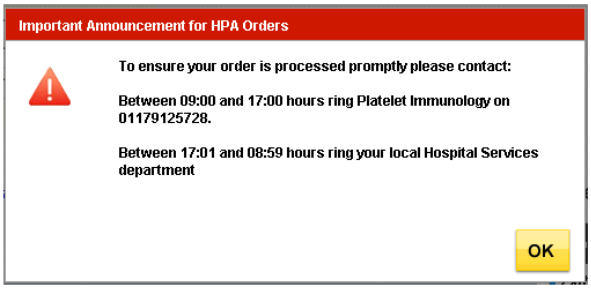
Any mandatory fields missed will be highlighted and need completion before you can proceed

Note: Recipient Code, Patient ABO and Patient RhD fields are not mandatory, but are required details when requesting products for a neonate or foetus that do not have their own mandatory details, but the mother's details are used instead.

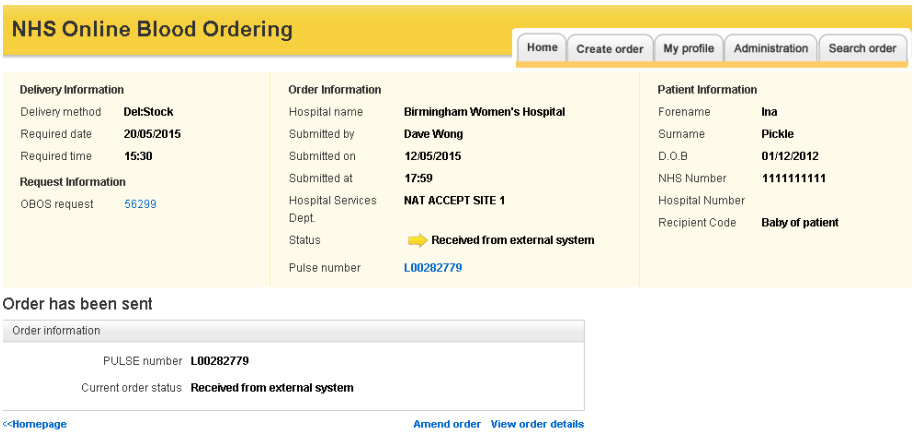


When your order is complete 'Add to Order' will move the details over to the right-hand side allowing you to Send the order. When the order is sent the advisory messages will appear, click OK to continue





An order confirmation will be received as shown below. This will show both the OBOS request number and the Pulse order number. All blue text are active links allowing you to view and amend orders.

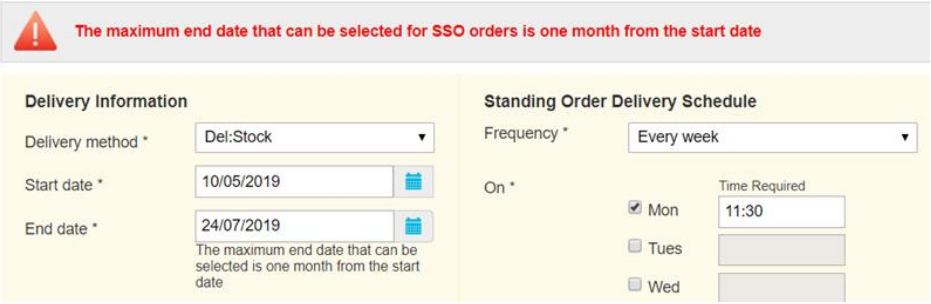


Once an order has been sent it will appear in the current orders tab on the home page between 0 and 14 days before the delivery date dependent on the local configuration. An order will not appear on the home page in advance of 14 days. Progress of an order can be monitored via the home page, see section on monitoring order progress.

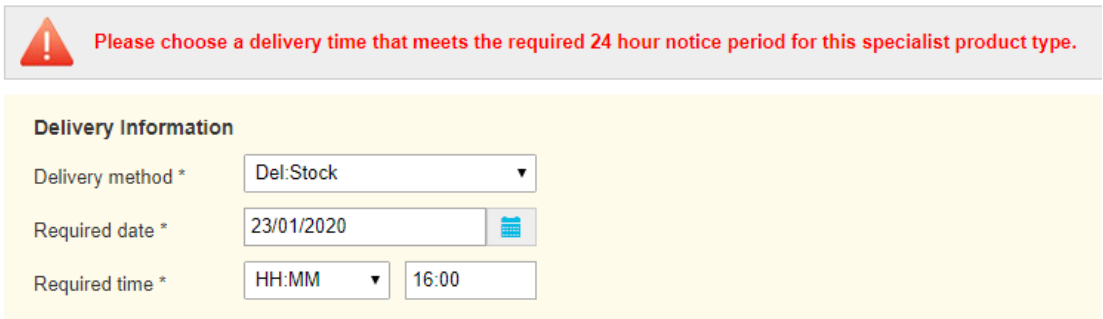
Specialist Stock Standing Orders [back to top]

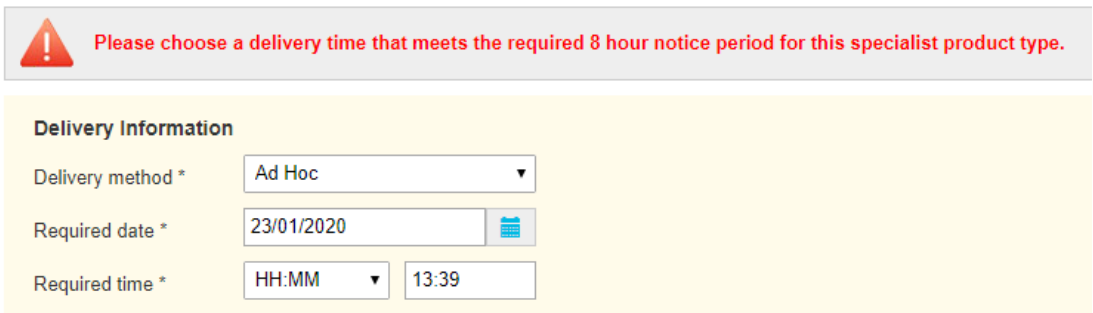
Select the option to “Create a Specialist Stock Standing Order” then follow the process for creating a standing order on page 28. The additional patient information will be requested as in a normal specialist stock order described above.

Note: Due to the need to review all patients and treatment effectiveness the end date for specialist stock, standing orders **cannot** be more than one month from the start date.



If there is less than 24 hours’ notification (Del: Stock or Collect) and 8 hours’ notification (Adhoc) is given between the time order is placed and the required delivery time the user will be shown a warning message. The user will be required to alter the delivery time before the order can be submitted.

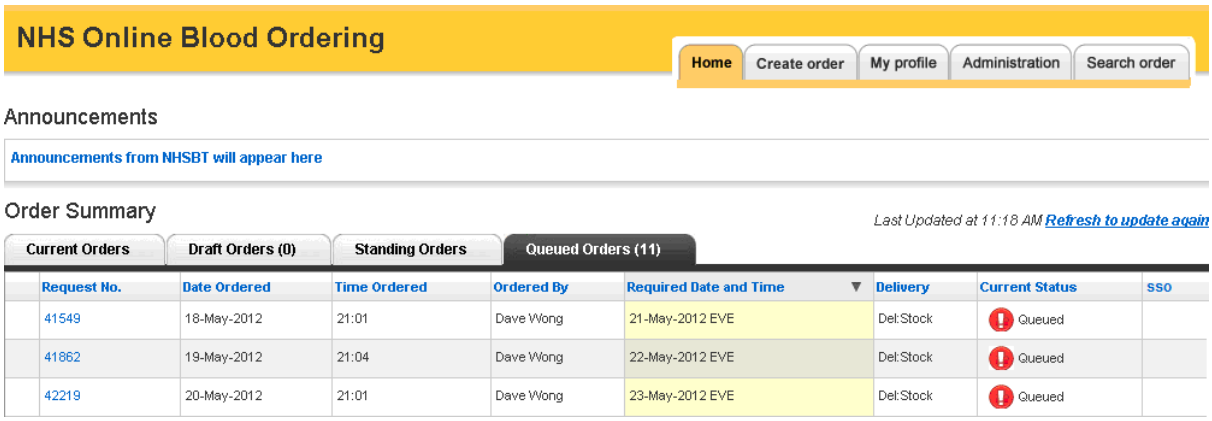




Using OBOS when Pulse is unavailable. [back to top]

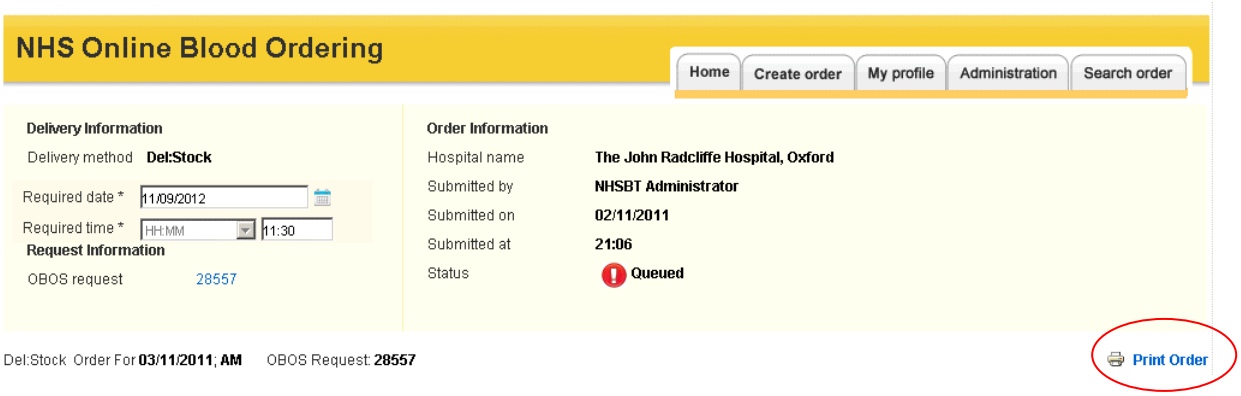
If an order cannot be sent to PULSE, then it will appear in the queued orders screen accessed via the home page as shown below. This tab has the number of queued orders at any time shown in brackets on the tab heading. On this tab the request number is the OBOS number

as no PULSE request number will be allocated whilst the link between Pulse and OBOS is down. Status will be shown as queued.



OBOS will continue to try to send queued orders to Pulse every few minutes until successful. If a queued request needs to be placed urgently then by clicking on the OBOS request number, the OBOS request screen can be accessed as shown below.

The 'print order' option can be found on the right-hand side of this screen and the printed order can be faxed to Hospital Services to be processed urgently. Faxed orders must be accompanied by a telephone call to ensure hospital services staff has received them. Due to essential regular maintenance OBOS will be unavailable on a Sunday between 03.00 and 03.20.



Should OBOS be unavailable please use the appropriate request forms for Standard/Non-standard and Emergency component requests and fax to your local Hospital Service department. Emergency orders should be followed up by a phone call to ensure receipt.

For Specialist Stock Orders please use FRM559 Request for HLA Selected Products - Second and subsequent Orders. For HPA components contact H&I Filton during core hours or Hospital Service out of hours.

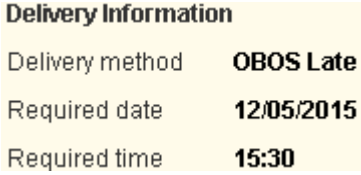
All forms can be found on the Hospitals & Science website

Amending an order once it has been sent [back to top]

Orders can be amended in OBOS until NHSBT have started to allocate components to it. At this point the order becomes locked and the option to amend an order will not be available on the screen. If amendments are still required, or the order is for specialist components such as Washed Red Cells then please contact your local NHSBT Hospital Services Department.

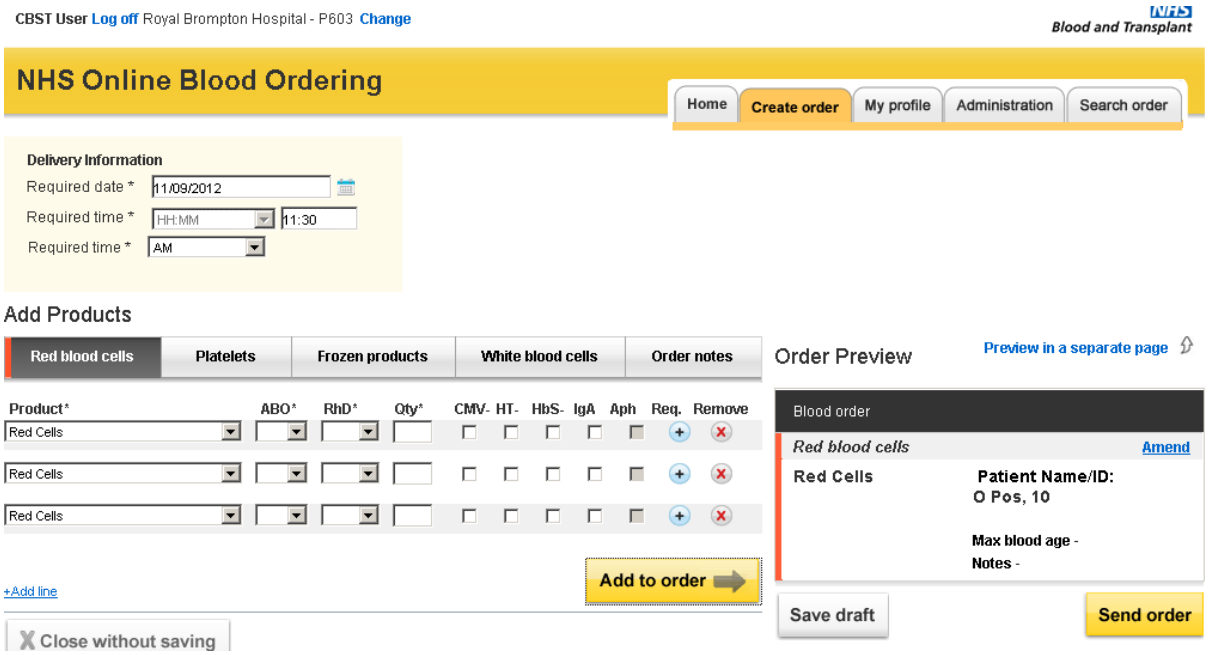
If an order has a delivery type of 'OBOS Late' the delivery method, date, or time will not be able to be amended until it has been assigned one of the following delivery types by NHSBT Hospital Services:

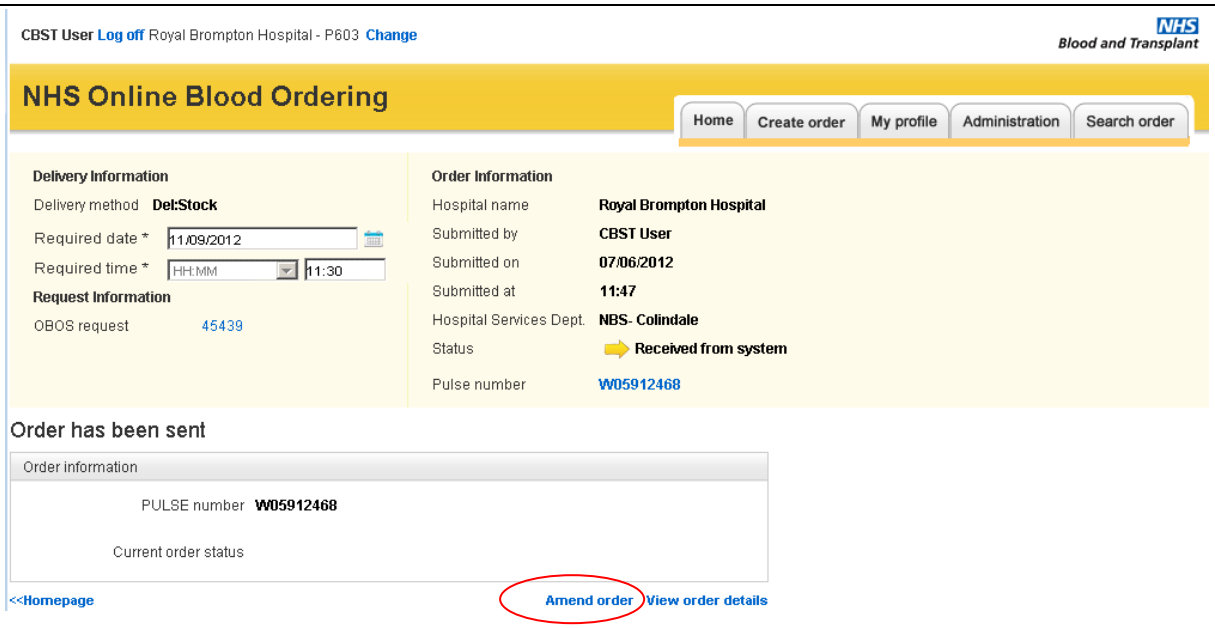
- Ad Hoc
- Emergency
- Del: Stock
- Collect
- Emergency Collect



Please Note: Any additions to an order are recorded against the PULSE request number and will not be changed in the original OBOS request.

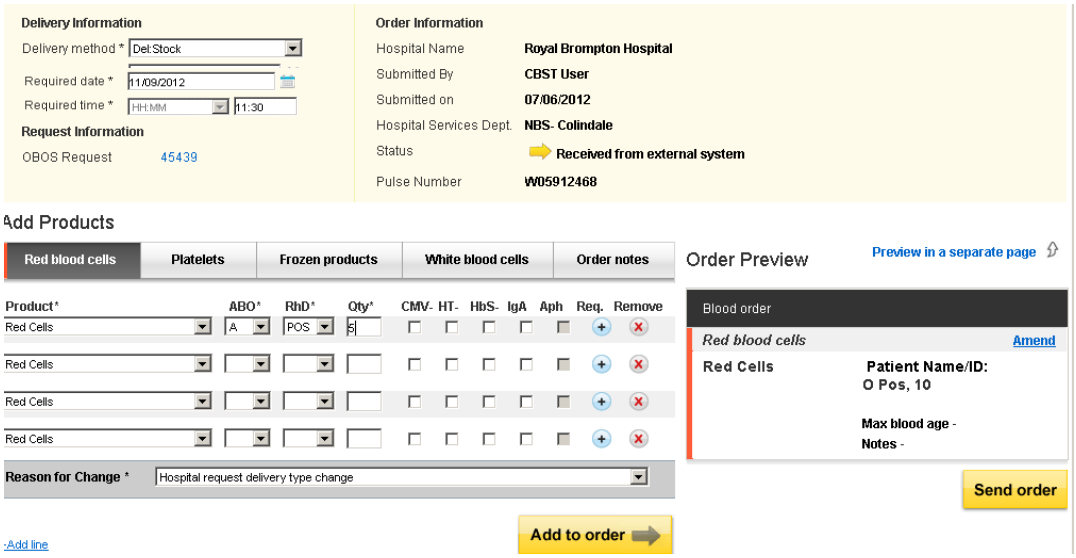
The example below shows 10 O pos red cells are ordered generating OBOS request 45439 and Pulse order number W05912468.



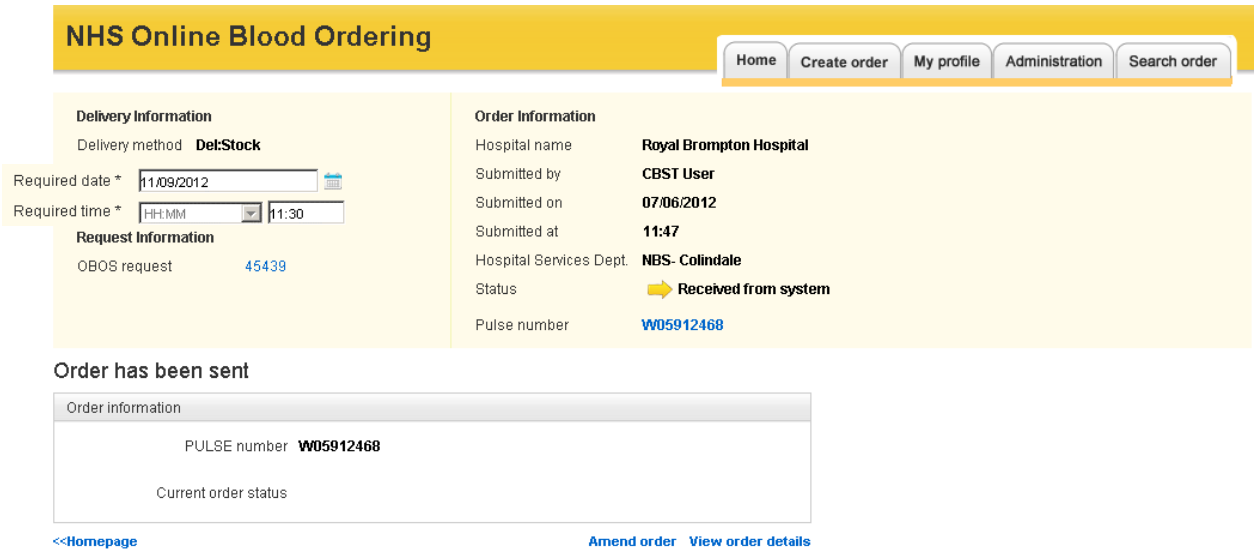


Clicking on ‘Amend order’ moves an individual component type back into the Add Products screen so that you can make changes. An order can also be amended by clicking on the Pulse number on the Home Page and then the grey ‘Amend order’ button.
A reason for the change must be selected from the drop-down list.

In the example, shown below, 5 A Pos red cells were added.

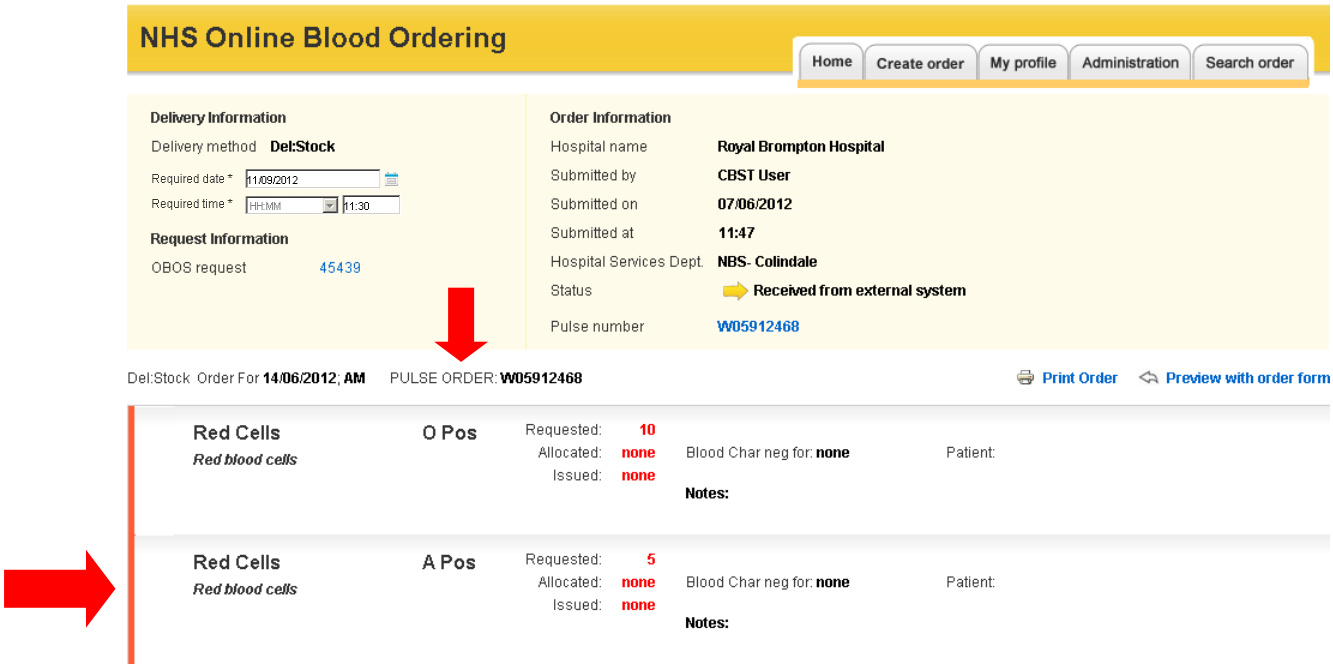


When the amended order is sent the new confirmation received contains the same OBOS and Pulse numbers.

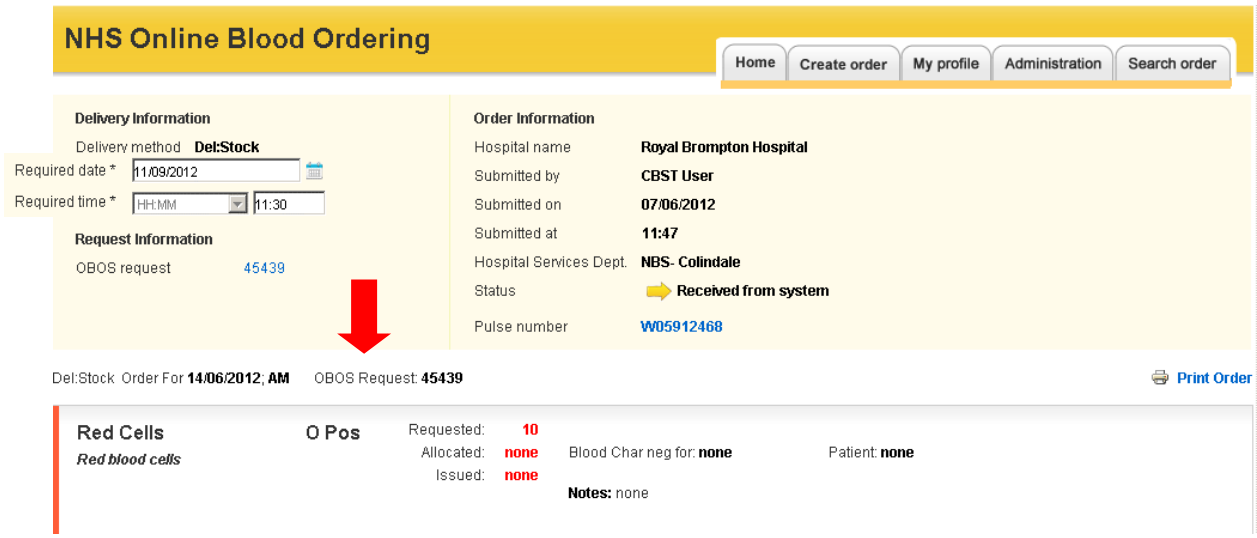


The Pulse order now contains the additional red cells; however, the OBOS request retains the original request information. See below.

The Pulse order reflects the changes

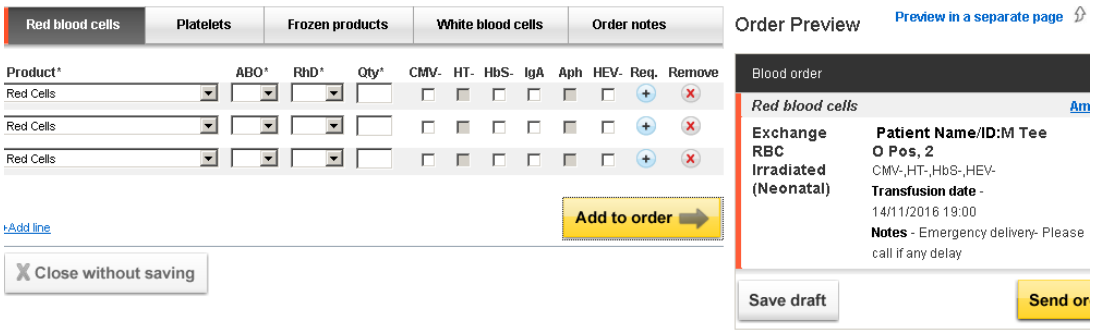


The OBOS request retains the original order details –

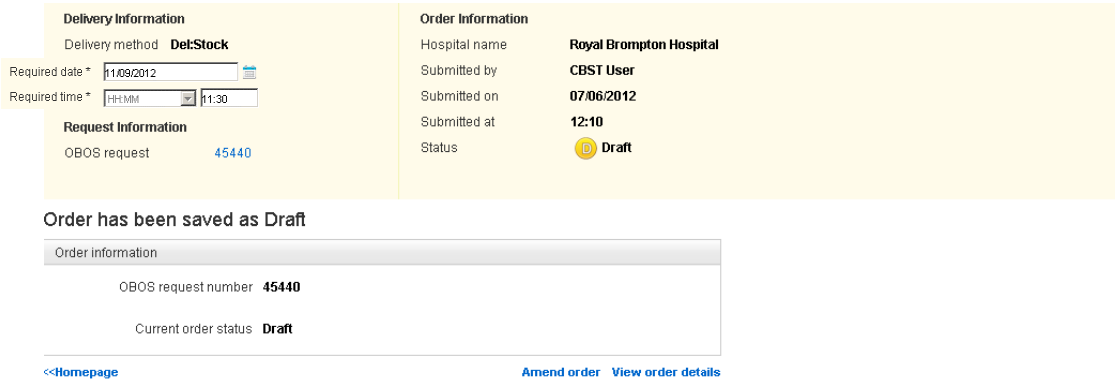


Saving a request as a draft [back to top]

If a request is compiled in advance of when it is required, additional components may be added later or if you are interrupted in the middle of completing a request then a request may be saved as a draft by clicking on the 'save draft' button to the left of the send order button.



A confirmation screen shown below will appear showing that the order has been saved as a draft.



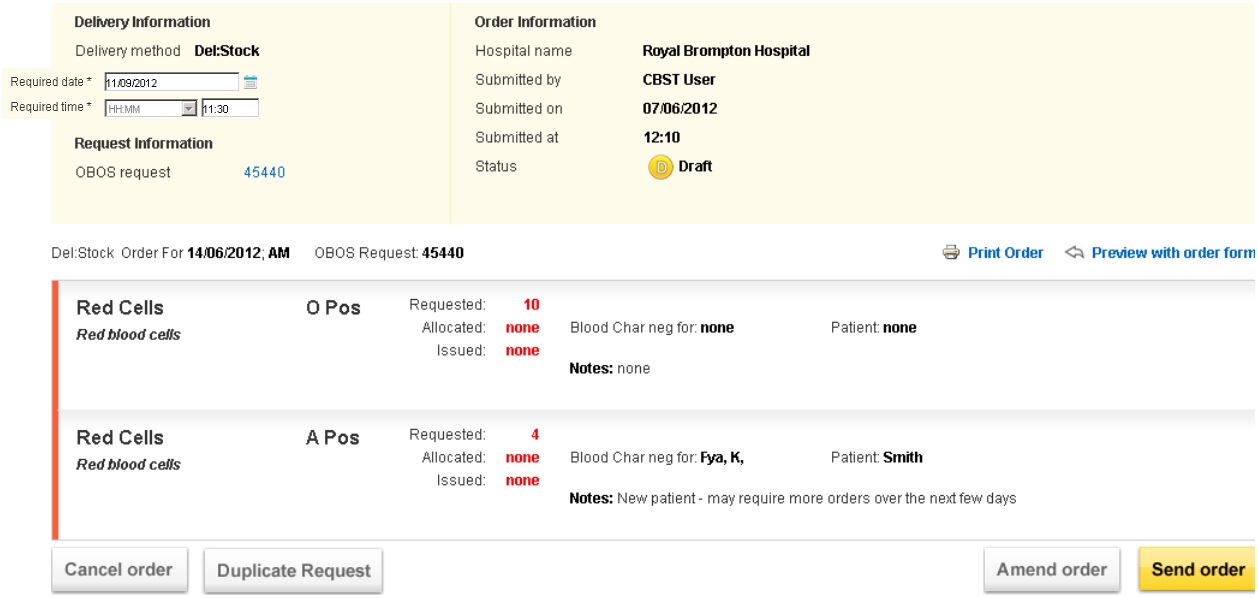
An OBOS request number will be allocated but no Pulse number will be allocated as the order will not have been sent to NHSBT.

Draft orders can be accessed via the draft orders tab on the home screen as shown below. The counter next to draft orders indicates how many draft orders have been saved. To re-enter the order, click on the OBOS request number in blue on the left-hand side of the screen.

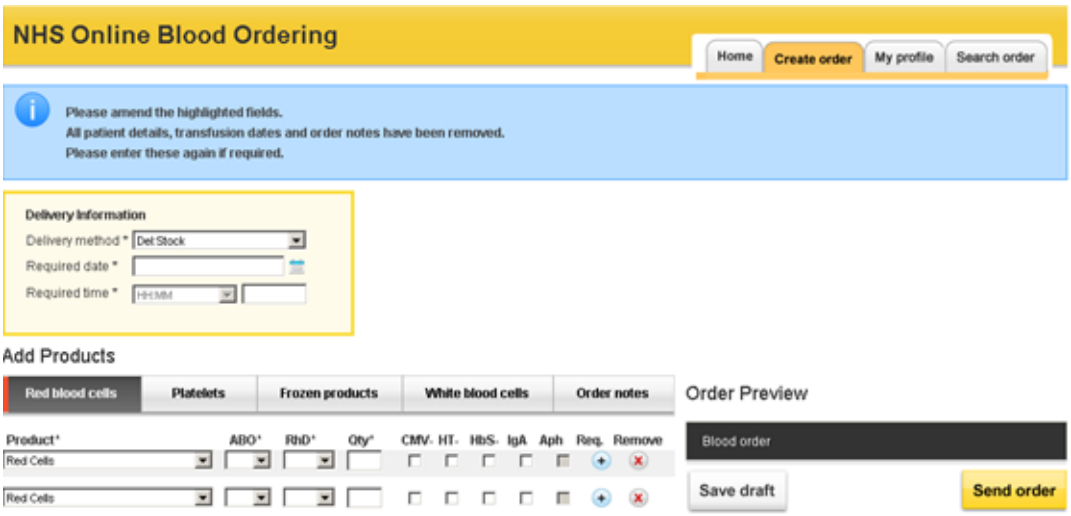
The request can then be amended, duplicated, cancelled, or sent as required.

Duplicating a request [back to top]

It is possible to create a duplicate of a request that has been placed previously. A duplicate request button exists on draft or completed OBOS request screens. Click on the 'duplicate request' button located at the bottom of the screen.



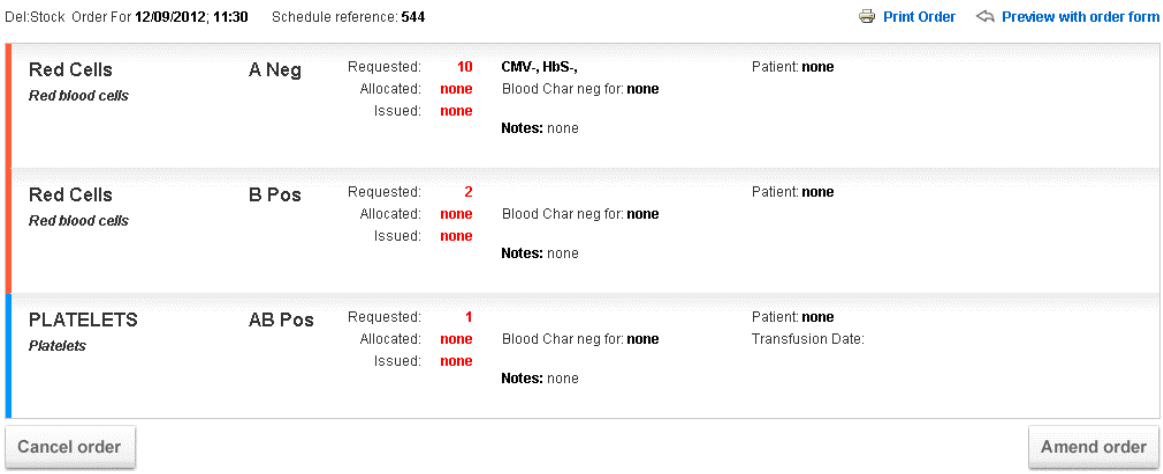
A new request screen will appear as shown below with an information box indicating that some fields, for example date and time required will need to be re-entered. All request lines will need to be edited for any changes to patient details, transfusion dates and notes and re-added to the new order using the 'add to order' button. A yellow surround to the product tab indicates that there are lines in that tab to review. Once all details have been updated and all lines required added the new request can be submitted by clicking on the 'send order' button. This new order will then be allocated a new OBOS request number and a new Pulse order number.



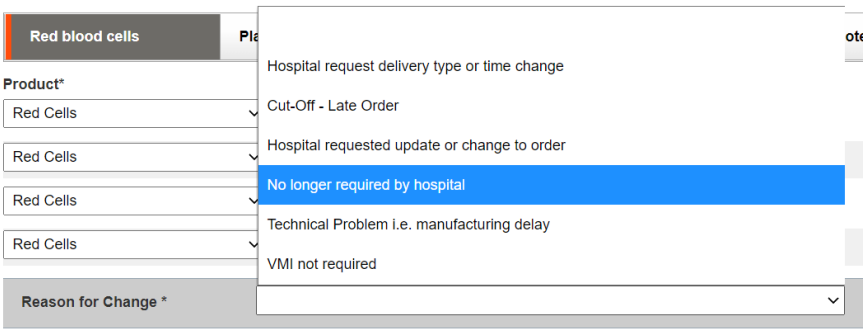
Cancelling a request or order [back to top]

Orders can be cancelled on OBOS up to the point at which NHSBT start to process the request and can be done by accessing the order, selecting 'Cancel order' and following the on-screen instructions.
When the order is being processed the order is locked and the cancel order button will not appear, to cancel please contact your local Hospital Services department.

HLA platelet orders are cancelled in the same way as above, should the order be locked please contact the H&I Platelet Desk on 020 895 72814 Mon-Fri 09:00 to 17:00 or your local Hospital Service department at any other times

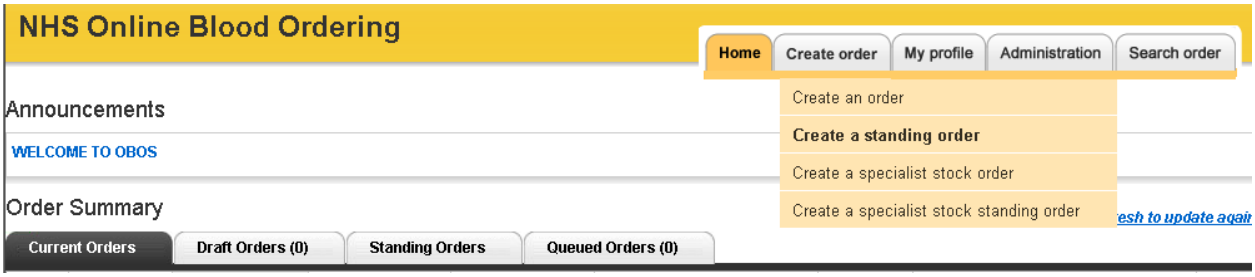


When cancelling or amending an order the user will be asked to confirm the actions and select a reason for the change.



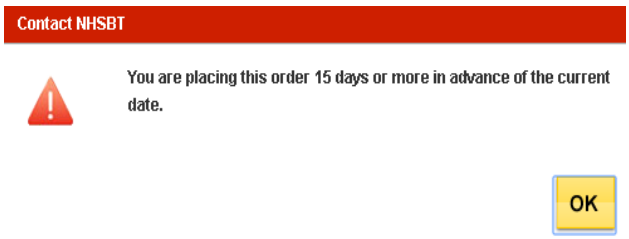
Creating a Standing order [back to top]

From the home page create order tab select ‘create a standing order’ or ‘create a specialist stock standing order’



Select a delivery method and start date, the start time option will be unavailable.

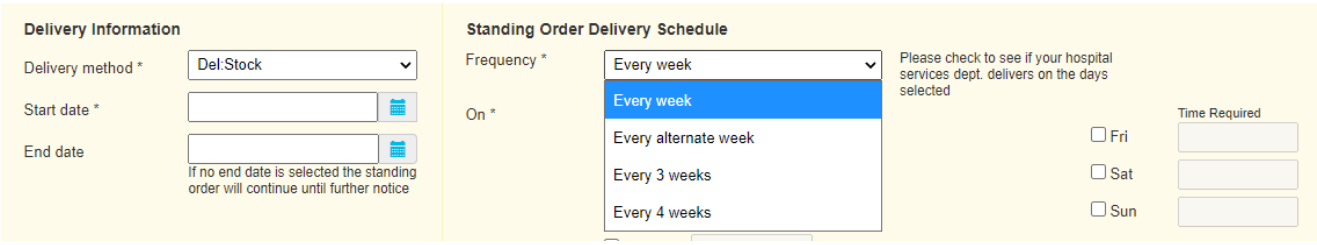
When selecting a date over 15 days in advance this warning message will be shown.



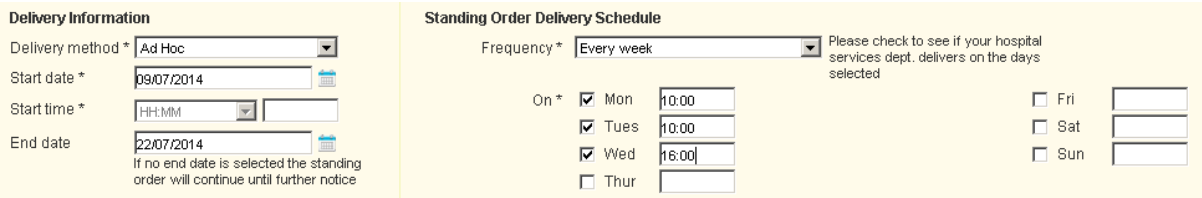
There is no option to select emergency delivery or emergency collect for a standing order.

In the standing order delivery schedule shown below select either Every week, Every alternative week, Every 3 weeks or Every 4 weeks from drop down list.

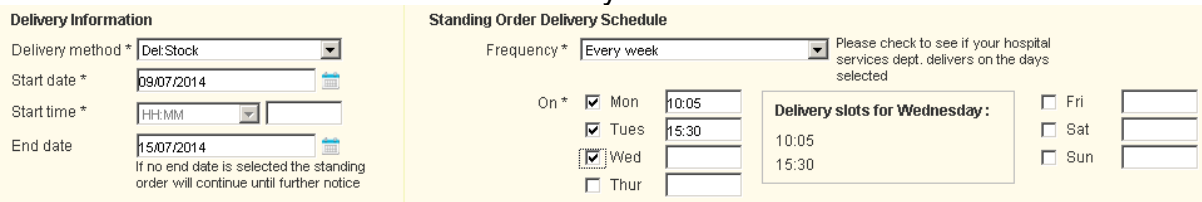
Please check that routine deliveries are available from your usual schedule for standing orders otherwise ad hoc deliveries may be used



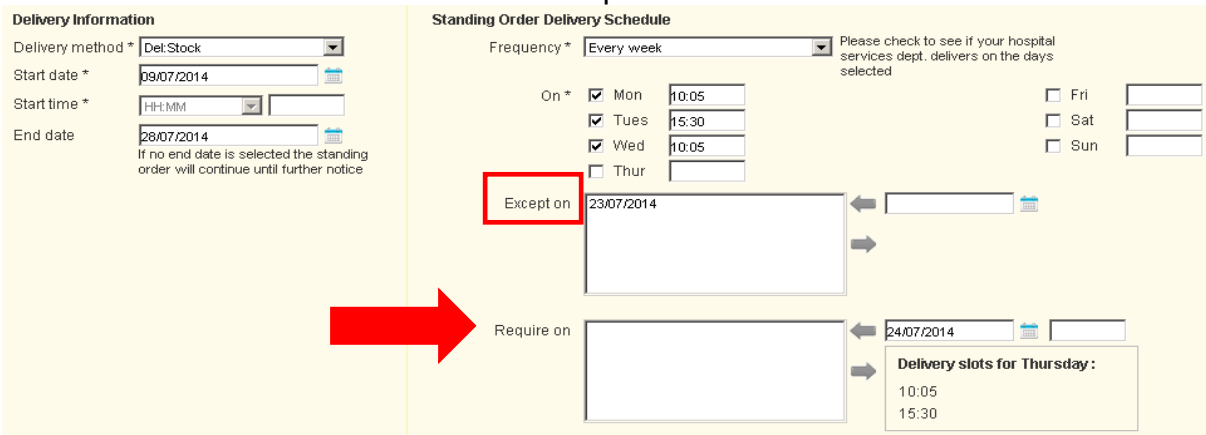
When choosing the **Ad Hoc** or **Collect** delivery types, select the days you wish the standing order to be delivered /collected and manually enter the time for each day.



When choosing the **Del: Stock** delivery type, select the days you wish the standing order to be delivered and select a time from the 'delivery slot matrix'



Select the days of the week that the standing order is required and select any exception dates that you wish to apply by highlighting them using the calendar icon and then use the ← arrow to move selected dates into the 'except on' box as shown below.



When a date is moved to the 'Except on' box an alternative date for that specific data can be chosen, i.e., 'Except on' a Bank Holiday Monday could be 'Require on' the following Tuesday.

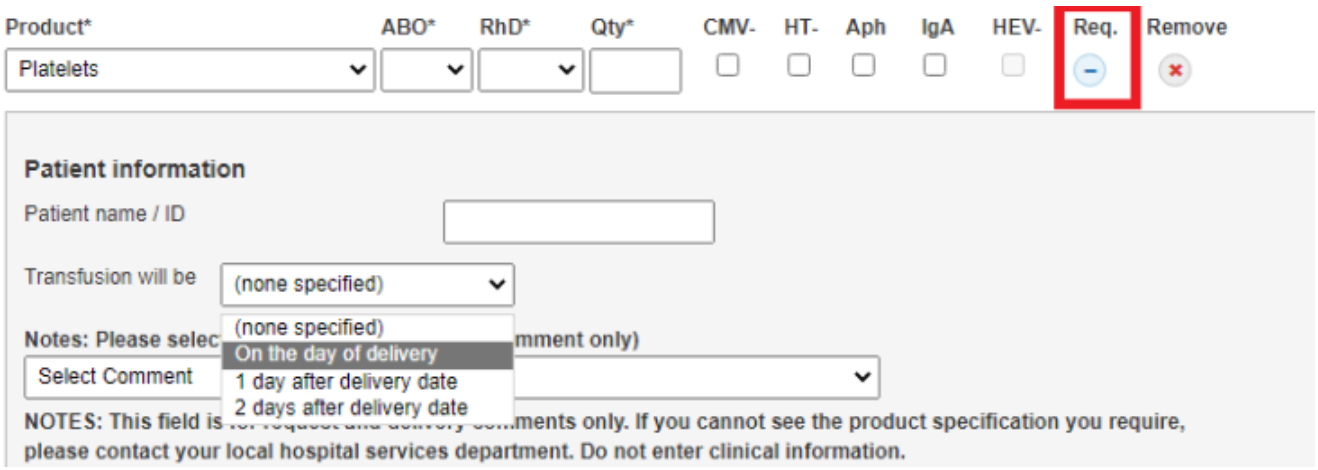
Dates moved into the 'except on' box in error can be removed using the → arrow.
It is possible to add an end date for standing orders. If no end date is selected the standing order will continue until cancelled by the user.
Component request lines, special requirements, patient names and order messages are added to a standing order in the same was as when creating a single order.

Transfusion Date – Platelet Standing Orders [back to top]

When creating a platelet standing order users can specify when after delivery the transfusion will occur to ensure adequate shelf life on the component(s). If no specific instruction is required, this will default to 'None Specified'

Expand the order by selecting the Req option then select if required either

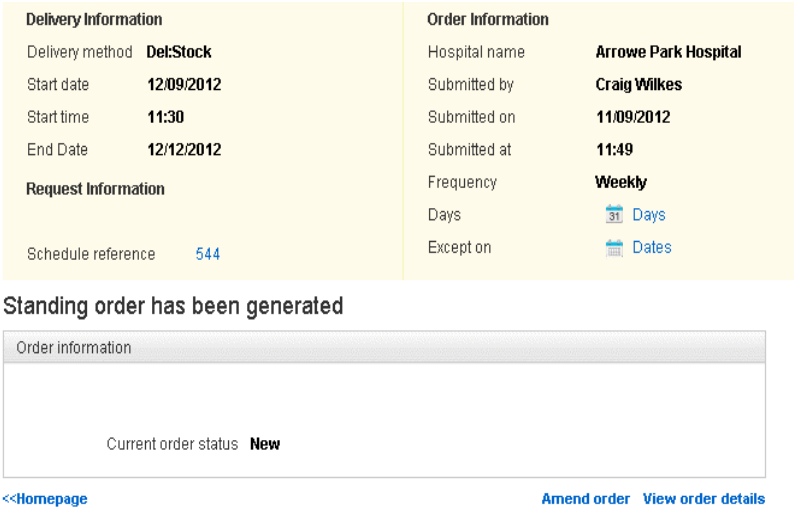
1) On the day of delivery
2) 1 day after delivery date
3) 2 days after delivery date



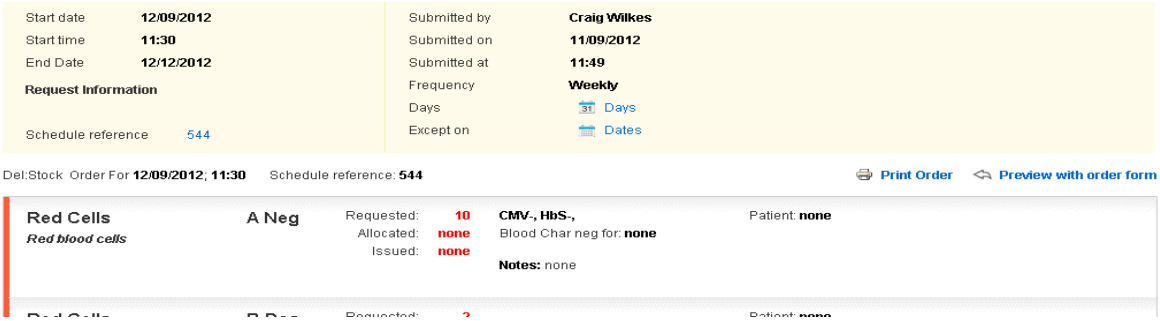
NOTE: This does not apply to Specialist Stock Orders (SSO)

Up to three patient names can be displayed on each standing order schedule. If you include more than three patients per schedule the additional names will not be displayed.

Once the order is complete click 'send order' to register the standing order on OBOS. Note: there is currently no facility so save a standing order as a draft.
Once the order has been sent the order confirmation page shows that a standing order has been generated and allows the delivery days and exception dates to be viewed by clicking on the blue icons as shown below. An OBOS schedule reference is listed on the left-hand side of the screen.

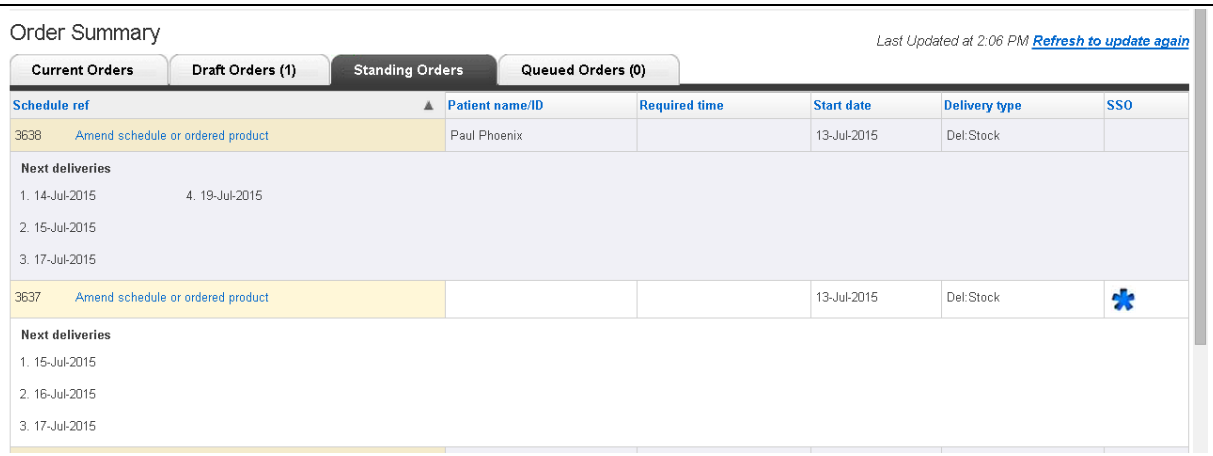


By clicking on the OBOS schedule reference the detail of the content of the standing order can be viewed. From this screen it is possible to 'print', 'amend' or 'cancel' the standing order.



From the home page standing orders can be viewed using the 'standing order' tab, shown below and will display orders that are due in the next three weeks.
Standing order schedules which have a start date up to 365 days from current date will now appear on the standing order tab on the home screen. However, delivery dates will only start to populate the schedule within 20 days of the required date. OBOS will automatically send an instance of a standing order to Pulse when it becomes due for delivery in eight days' time (or within the next eight days for new standing orders).

At this point the next deliveries date will disappear from the Next deliveries section and the order will appear on the current orders section of the home page together with the Pulse order number that has been assigned to it. From this point on, this instance of a standing order can be edited and updated in the same way as stand-alone single orders.



Up to three patient names can be displayed on each standing order schedule. If you include more than three patients per schedule the additional names will not be displayed.

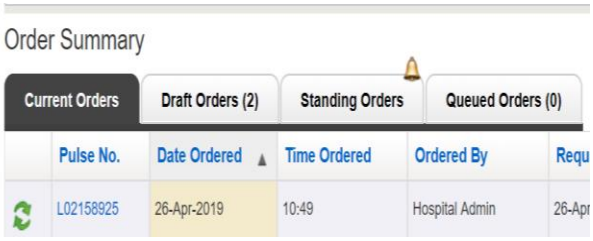
Please Note: Specialist Stock Standing Orders will only cover one patient and their name will not appear on the general standing order page.

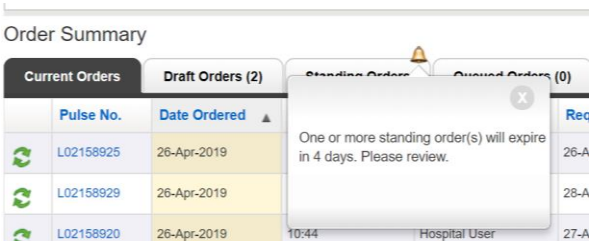
To help identify instances of standing orders that have moved to the home page they will have a standing order icon on the left-hand side. By hovering over this icon, the original OBOS standing order reference number can be viewed as shown below.

When you view an individual instance of a standing order a live link to the OBOS request, schedule reference and pulse request can be seen. If the individual instance of the standing order is amended, then the standing order icon will disappear as the Pulse order is not then the same as the original OBOS standing order request.

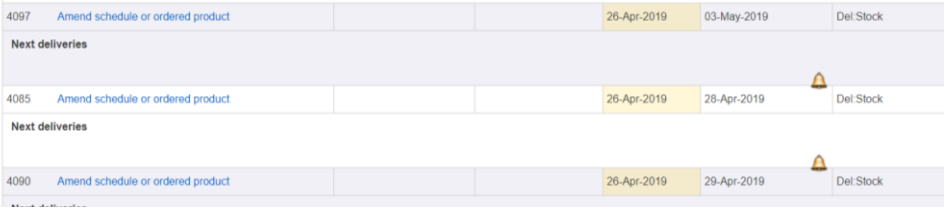
Monitoring Standing Orders [back to top]

When a standing order is approaching its end date a bell icon will be displayed on the standing order tab on the home page. Hovering over the icon will show an advisory message. Users can view the details of the order by selecting the 'Amend schedule or ordered product' link

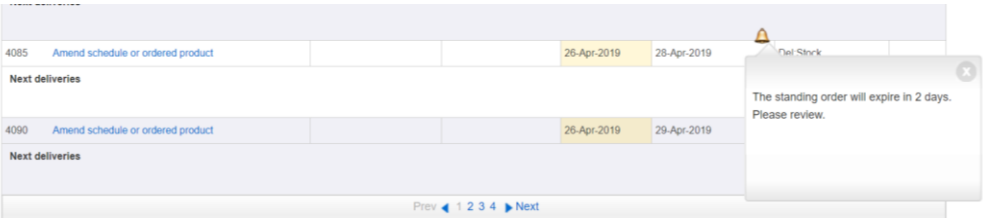




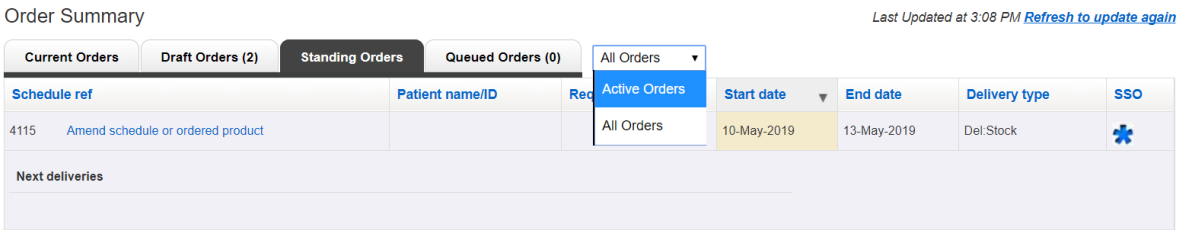
In the standing orders tab the orders due to expire will be identified with the bell icon.



The expiry details of each order can be seen by hovering over the icon.



It is recommended that standing orders that have no future delivery dates are removed as part of good housekeeping. If you are required to keep all standing orders the page can be filtered to only show active orders as shown below.

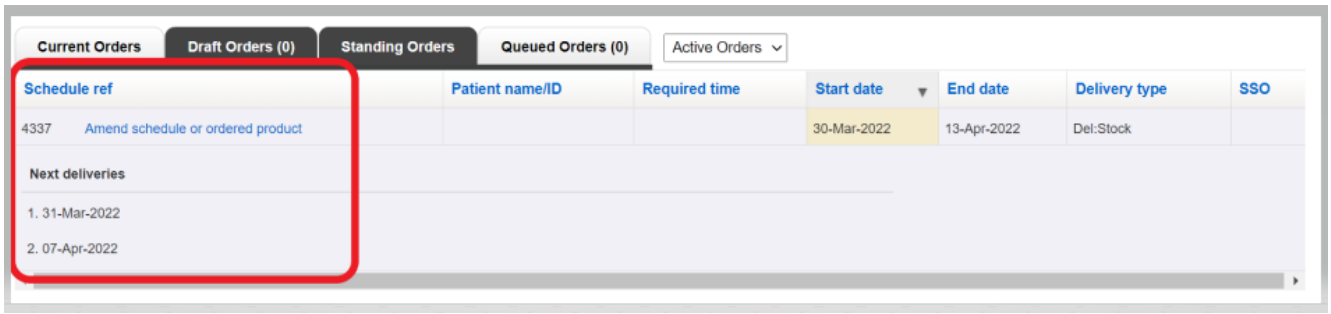


Cancelling Standing Orders (Partial/Complete) [back to top]

Once a standing order schedule is submitted, each individual order moves over to the home page and sent to NHSBT to be processed eight days prior to delivery.

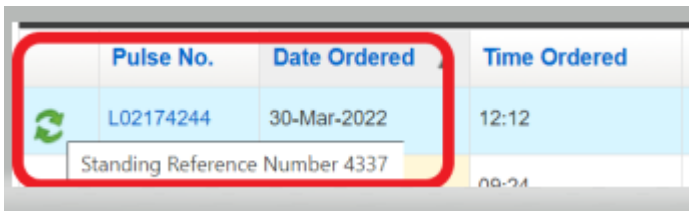
Enter the standing order via the standing order tab and select the Amend schedule or ordered product option. Follow the onscreen instructions to cancel the schedule.

NOTE: This will only cancel future orders related to that standing order schedule that have not transferred to the homes page

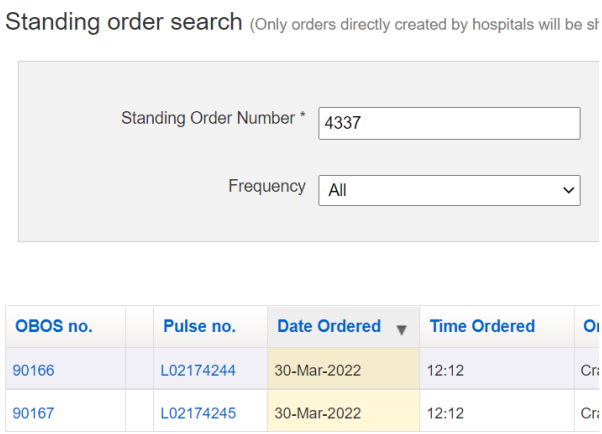


To cancel any order(s) that have moved to the home page and over to NHSBT you can either:

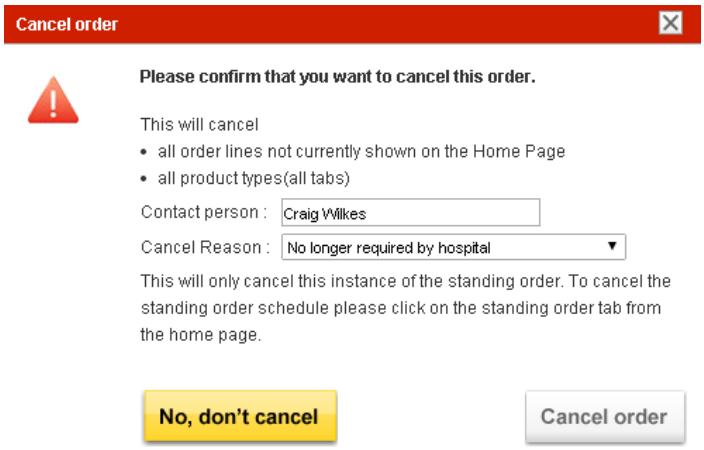
a) Find all the individual orders associated with standing order

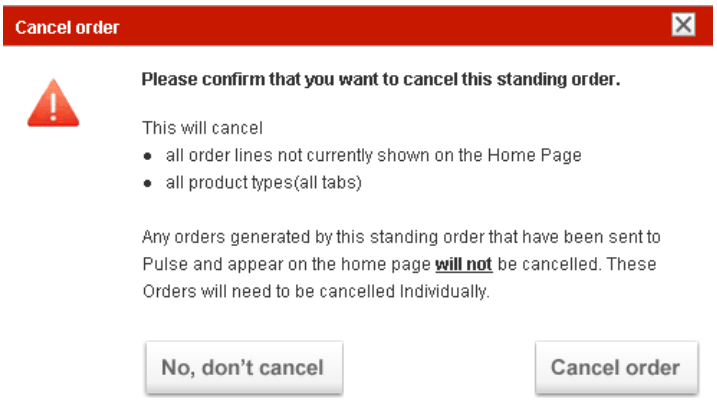


b) Under the 'Search Order' tab search for all orders associated with the standing order number and amend/delete each order displayed



When cancelling/amending any order the user will be required to confirm change(s) and give a reason





HLA platelet orders are cancelled in the same way as above, should you have any problems contact the H&I Platelet Desk on 020 895 72814 Mon-Fri 09:00 to 17:00

Tracking orders [back to top]

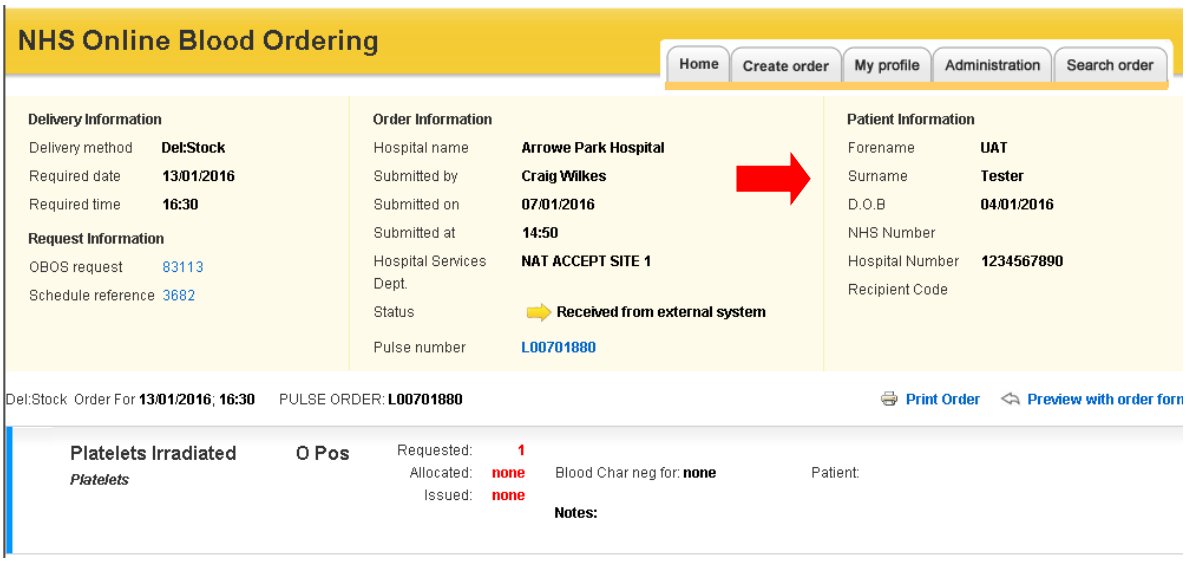
From the home page users can see the progress of orders as below. A list of OBOS icons and headings is available in appendix two.

- Received from external system – indicates that NHSBT have received the order and a Pulse order number had been allocated.
- Awaiting allocation – indicates that staff at NHSBT have viewed the order but have not yet allocated specific donations to fulfil the order.
- Waiting for issue – indicates that units have been allocated to the order, but the order has not yet been prepared.
- Partially issued – indicates that some components have been issued but the order is not yet complete.
- Locked by another user – indicates that staff at NHSBT are currently viewing the order.
- Preparation in progress – indicates that staff at NHSBT are currently issuing components to the order.
- Prepared awaiting dispatch – indicates that the order is complete but had not yet left NHSBT
- Notif. Outstanding dispatched – indicates that the order has been dispatched from NHSBT, but hospital have not confirmed receipt at the hospital.
- Notification received – indicates that confirmation of receipt has been received by NHSBT and the process is complete. Once orders reach this stage, they will no longer appear on the home page but can be searched for using the search function.
- Unfulfilled – no components are available to undertake the order.
- Awaiting patient link (SSO) – indicates H&I staff have viewed the Specialist stock order but have not yet linked the order to the NHSBT patient record.
- Awaiting assignment (SSO) – indicates H&I staff have not yet allocated specific donations to fulfil the order.
- Awaiting authorisation (SSO) – indicates H&I staff have not yet submitted the order to be issued.
- Awaiting acknowledgement (SSO) – indicates H&I have submitted the order ready for issue
- To be updated by the hospital – indicates the specialist stock order received from OBOS cannot be processed. H&I staff have returned the order for it to be amended or cancelled by the hospital.

Tracking 'Specialist Stock Orders' [back to top]

From the home page it is possible to track the progress of Specialist Stock Orders, indicated by the 'SSO' column and the icon. This column can be ordered so that all Specialist Stock Orders appear at the top of the list.

Clicking on the SSO icon or the Pulse number will take you into a **read only** view of that order.



Where patient information exists for that Specialist Stock Order, this will be visible in the upper right-hand pane.

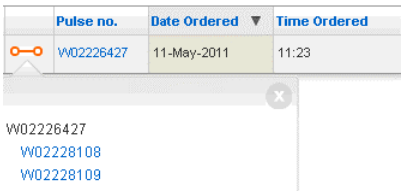
Specialist Stock Orders not created in OBOS do not have an OBOS request number. These specialist stock orders have been created by H&I staff following receipt of a faxed paper order from the hospital.

Please Note: This is a read only view of the order. The order cannot be amended or deleted without contacting NHSBT Hospital Services.

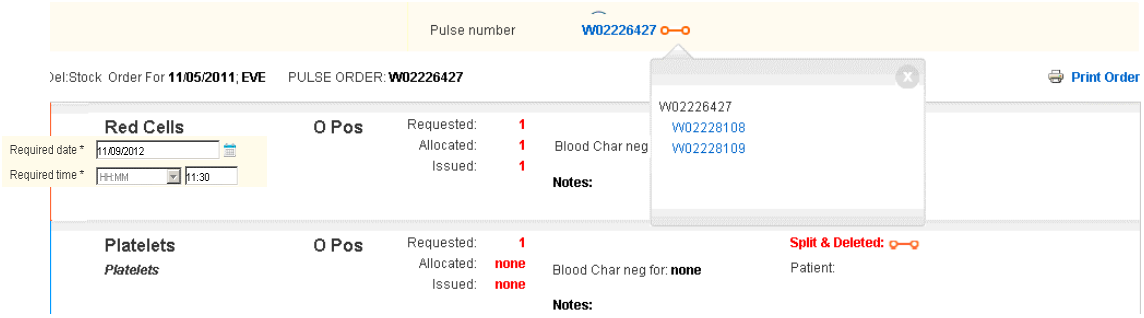
Split Orders

Pulse numbers are listed to the left-hand side of the screen. In the far-left hand column an icon indicates that an OBOS request has been split by NHSBT into several Pulse orders. This is usually done to facilitate order preparation, either by separating products into different types or by separating products that will not be available until later.

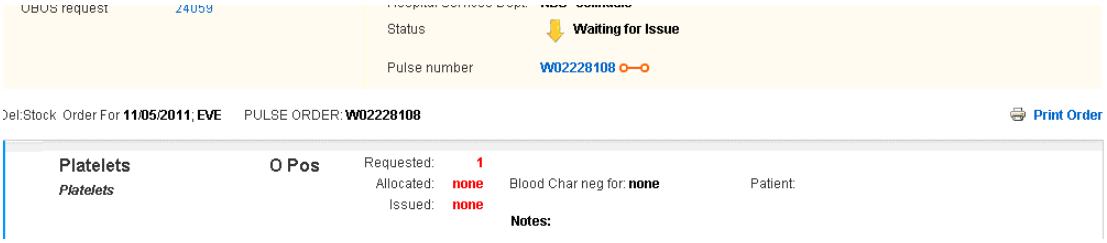
By clicking on the icon, the original Pulse order numbers can be viewed. By clicking on the PULSE number coloured blue, it is possible to view the order content as in the example shown below.



In the screenshot below, you can see that order W02226427 has been split into three, W02226427, W02228108 and W02228109. The red cell ordered remains on order number W02226427 and a component has been allocated to that order line. The platelet request shows as split and re-assigned.



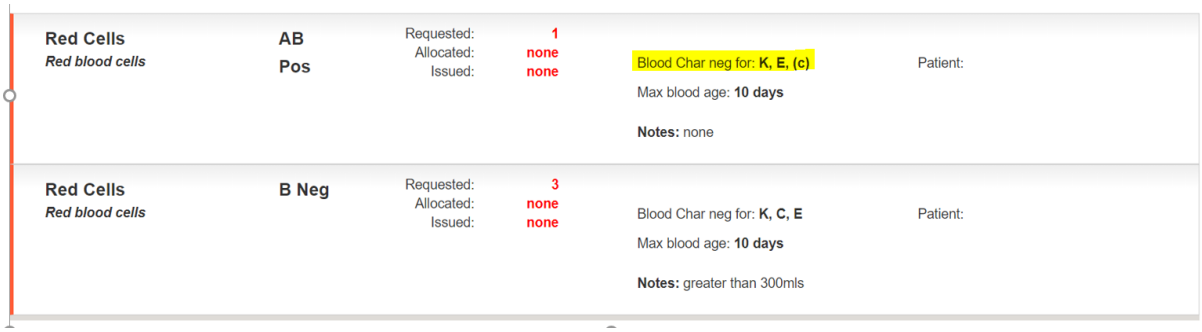
By clicking on the blue links in the pop-up box you can navigate to see that the platelet order has been split into order W02228108 – shown below. All split orders retain the original OBOS request number.



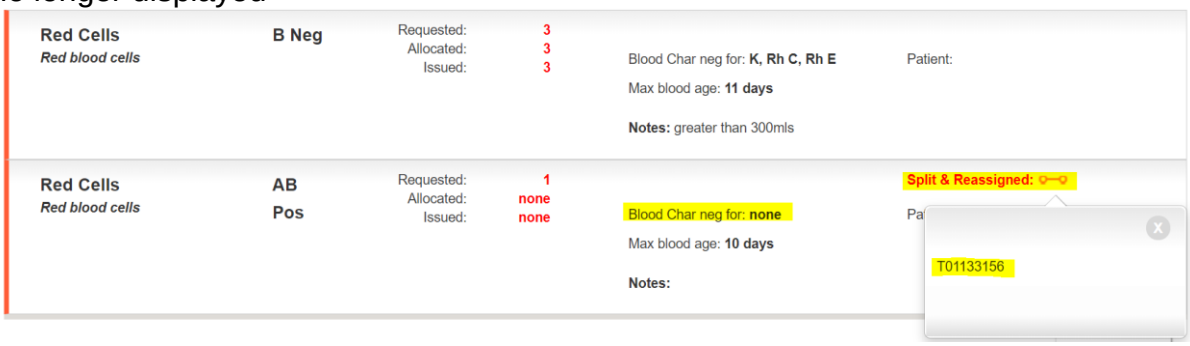
When an order is split in Pulse, the 'split' portion of the order will go back to a status of 'awaiting allocation'. Users will now be able to amend / cancel the order if the products have not been allocated in Pulse.

NOTE: Users may notice that when an order is split, the details displayed on screen for the part of the order moved to the new split order may display differently.

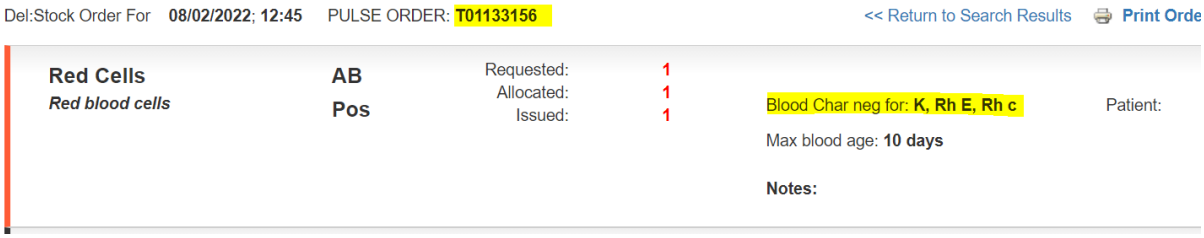
In the example below the original order shows certain blood characteristics for AB Pos K, E, (c) units



The AB units were split from the original order to a new order as shown below. The K, E, (c) are no longer displayed

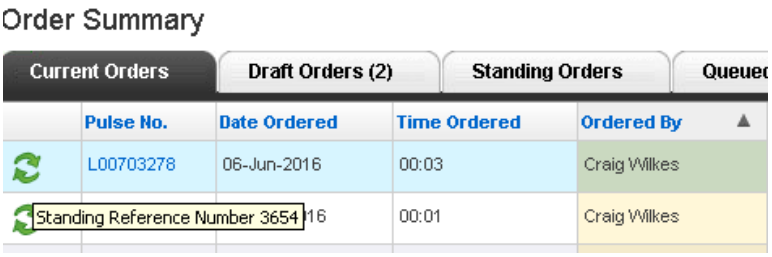


These blood characteristics are carried over to the new split order which can be seen by viewing the newly created part of the order, as seen below.



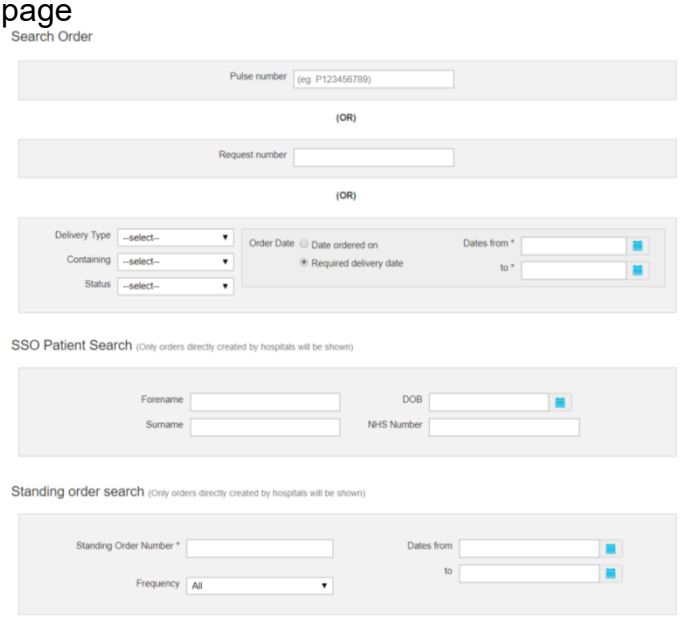
Tracking standing orders on the home page [back to top]

Standing orders are indicated on the home page by the icon. By hovering over this icon, the OBOS standing order reference can be viewed, see screen shot below. If a single instance of a standing order is edited via the Pulse order number, then this icon will not appear.



Searching Orders [back to top]

On the 'Search Order' page



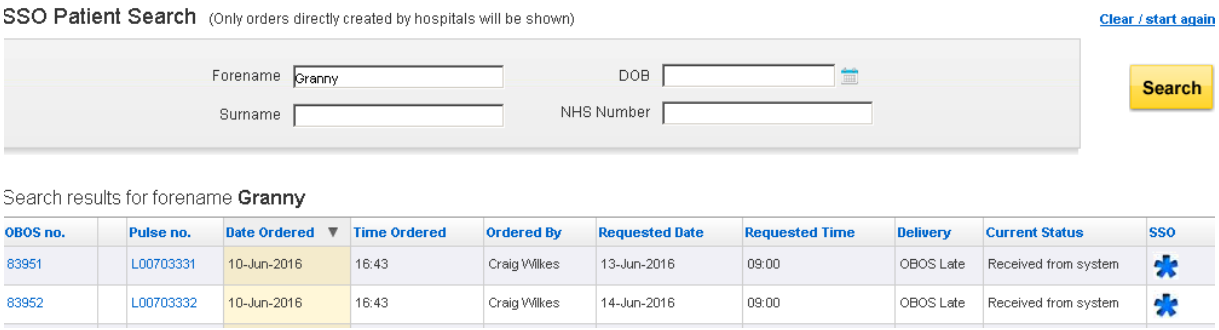
You can search non-Specialist Stock Orders using:

- Pulse number **OR**
- OBOS request number **OR**
- Any combination of the below. Using these will also require a date range between 1 day up to a max 31 days.
    - Delivery Type
    - Containing (product type)
    - Status
    - Date ordered on
    - Required delivery date

Or searching Specialist Stock Orders created by hospitals (not first-time requests created by NHSBT) using any individual or combination of:

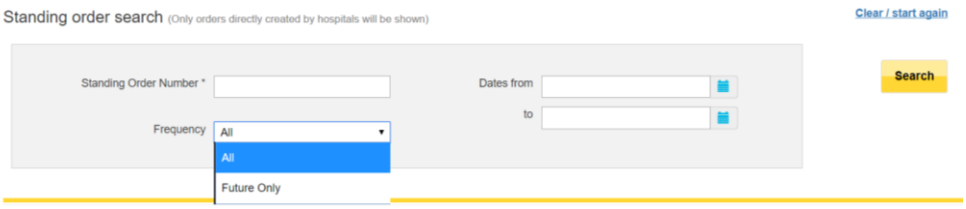
- Forename
- Surname
- DOB
- NHS Number

This will show you all orders associated with that patient

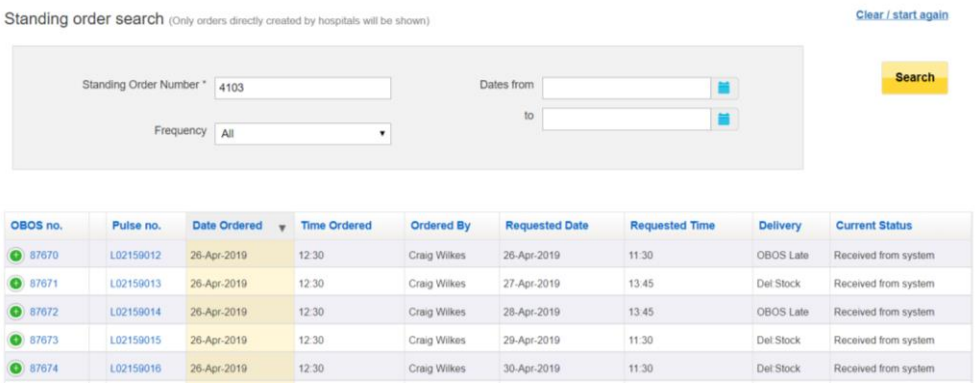


Searching Standing Orders

Or search Standing Orders using a standing order number. This can be for all orders or only future orders to be generated from that standing order using 'Future Only'

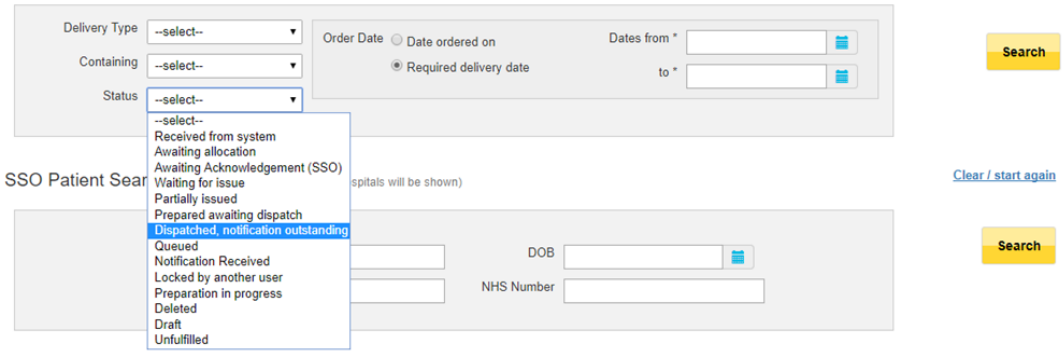


This will generate orders as shown below. Using the date range will narrow the search if required. Users can then click on the order to view and duplicate individual orders or cancel, amend future orders.

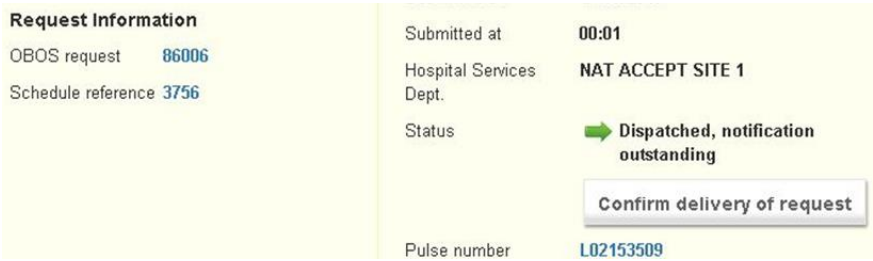


Reconciling Orders on OBOS [back to top]

Once a delivery has arrived users can reconcile orders by:
Selecting the pulse number of your order on the home page **or**
Searching for the pulse number using the search function **or**
Search for all orders with status 'Dispatched, notification outstanding' for a particular period (limited to a month period).

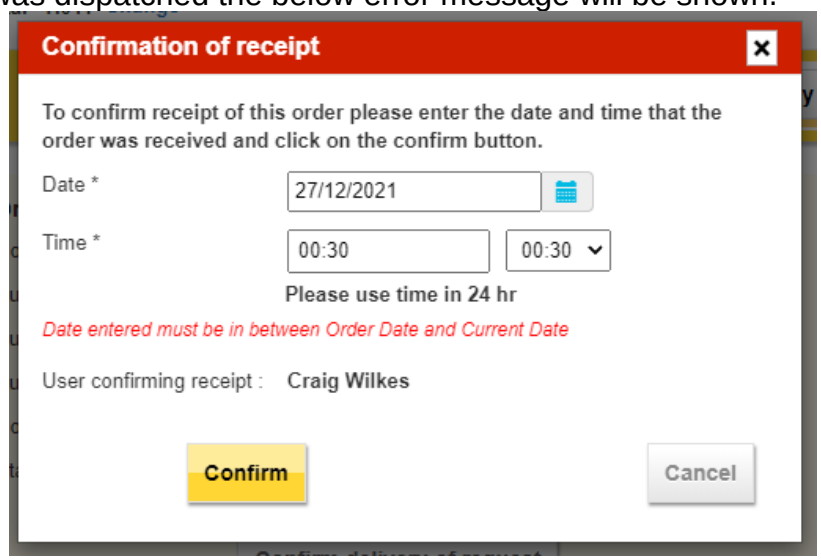


When the order(s) have been located, select 'Confirm delivery of request'



A pop-up box will appear asking for the date and time the order was received. Which can be completed using the calendar and entering the time either from the drop-down list or manual entry using hh:mm format.

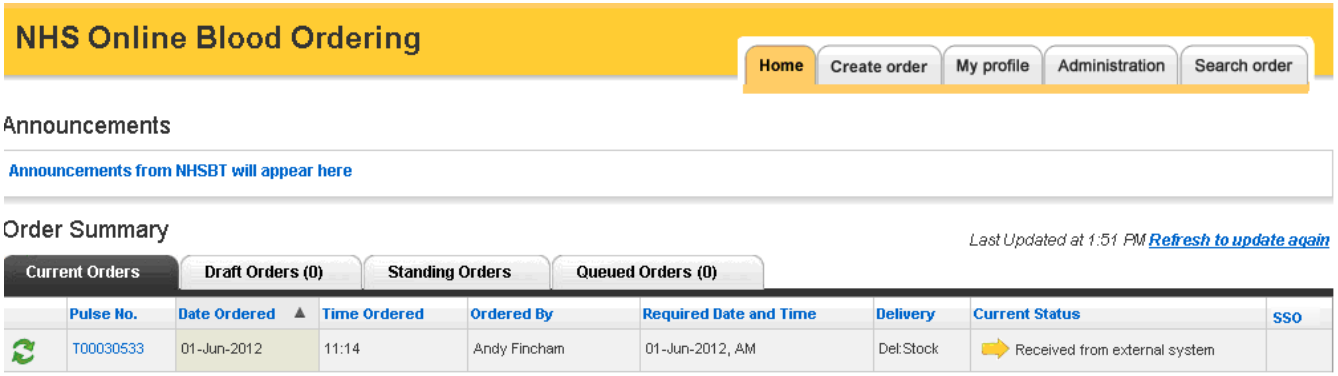
The account name being used will automatically appear. If the time and/or date entered are before the order was dispatched the below error message will be shown.



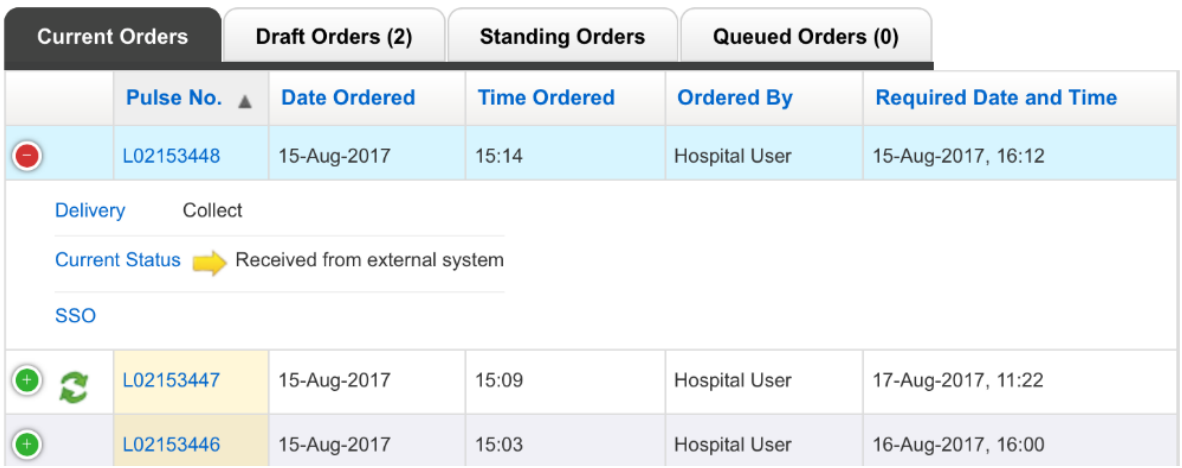
Once you have input the required details please click Confirm. The details entered will automatically transfer onto our electronic system and the status of the order will change to Notification received.

Using filters on the order summary tabs. [back to top]

The four order summary tabs on the home screen can be arranged using the PULSE number, date ordered, time ordered, ordered by, required date and time, delivery, or status. Click on the blue wording and the " ▼ " icon will appear to indicate the filter currently applied is in ascending order, click a second time and the" ▲ " icon will appear to indicate the filter is applied in descending order. Filters applied will remain in place until removed even if the user refreshes the screen or logs out and then logs back in again.



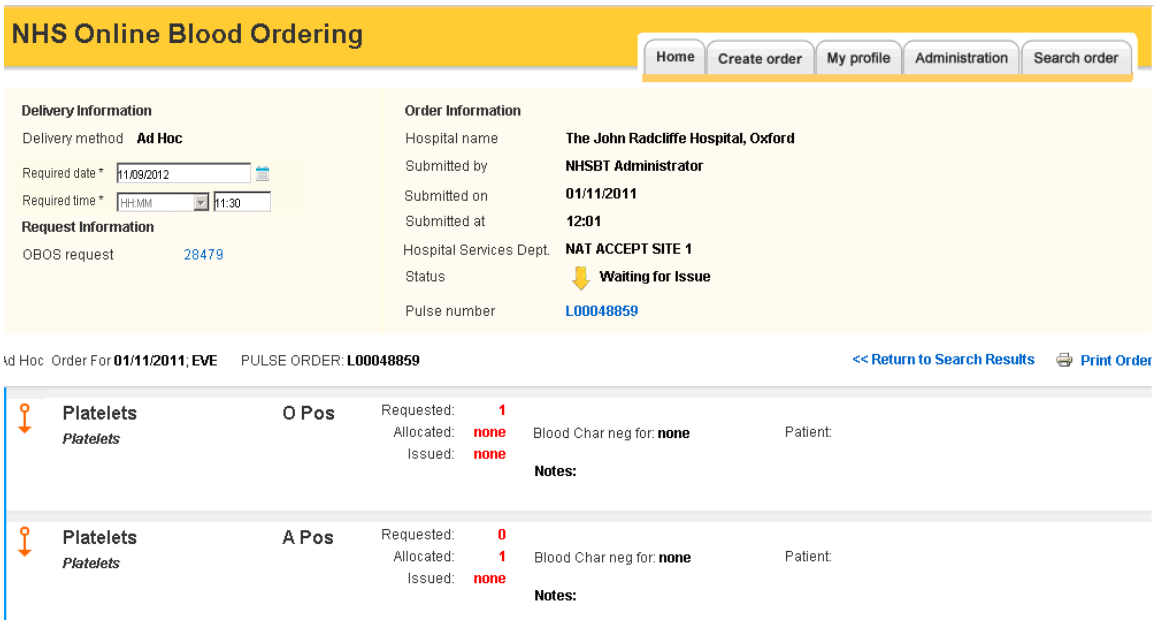
When using mobile devices, the screen size will depict what columns initially appear. These can be expanded and collapsed using the ⊕ and ⊖ buttons.



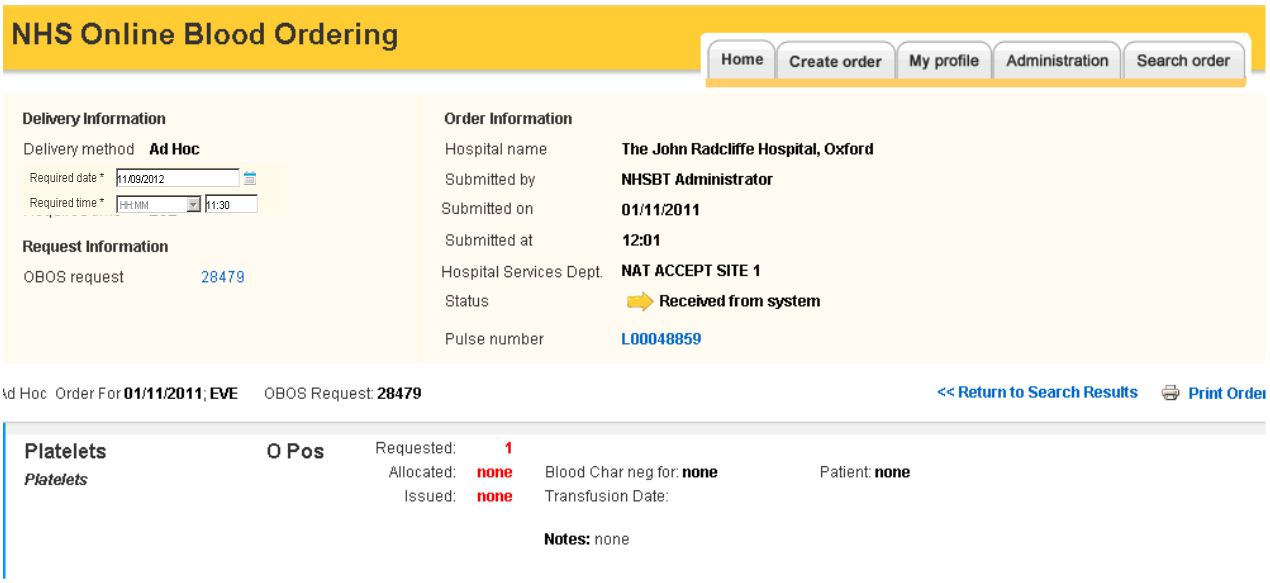
Component Substitutions [back to top]

When NHSBT is unable to supply a specific component, substitution of another suitable component will be agreed with the hospital by telephone. Details of the person agreeing the substitution will be held on Pulse and will not be transferred back to OBOS. Hospital staff can enquire by telephone if the name of the person who agreed the substitution is required.

Order L00048859 is waiting for issue and contains a substitution indicated by the icon. In this example in the first line the O pos platelet requested has not had a component allocated and the second line has an A pos platelet allocated although none was requested.

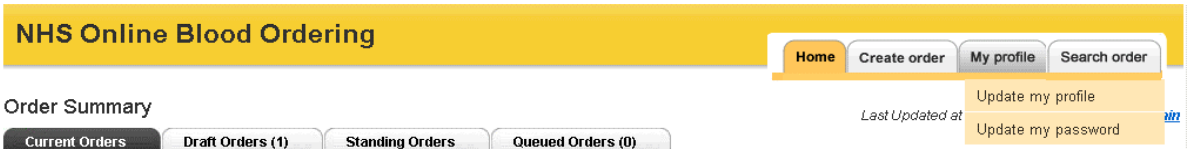


The original request can be viewed by clicking on the OBOS request number. As shown below this will contain only the information from the original request that was sent to Pulse.

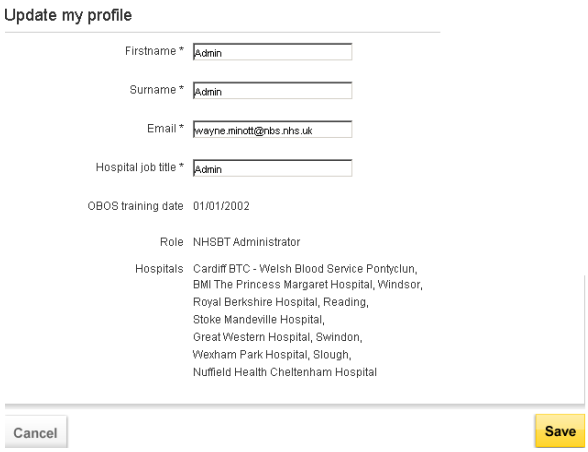


Updating options within my profile [back to top]

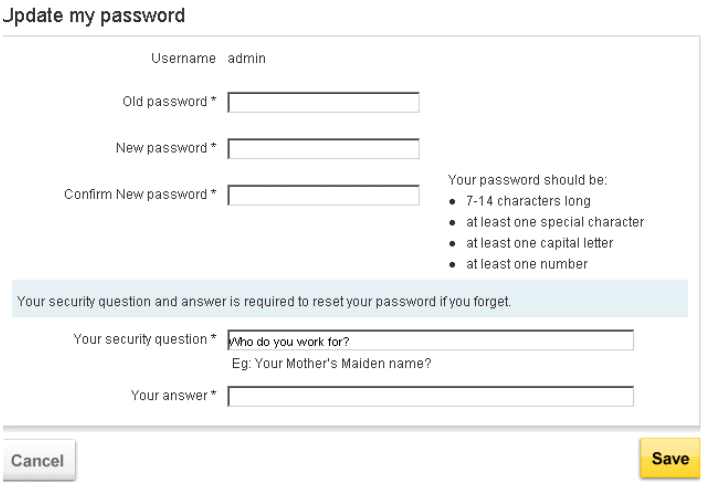
Two options are offered within 'My profile' tab, update my profile and update my password.



In the 'update my profile' screen, shown below, hospital users can edit and save their first name, surname, e-mail address and job title. Users will need to click on 'save' to update any changes made. Users are not able to change their training date; role or hospitals they are able to access on OBOS. Changes to these items need to be made by a hospital or NHSBT administrator.



In the update my password screen, shown below, hospital users can change their password or change the security question that they will be prompted to answer if they forget their password. Both passwords and security question answers are case sensitive. Users will need to click on 'save' to update any changes made.



Appendix One.

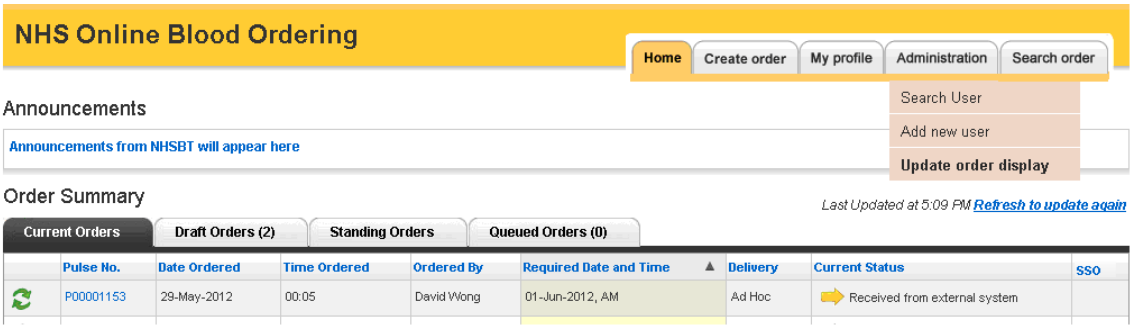
Administration.

Hospital administrators [back to top]

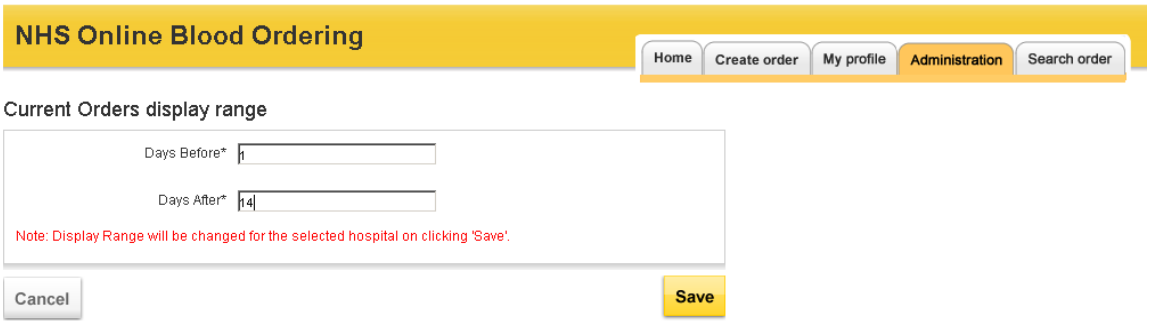
An initial hospital administration account will be set up by NHSBT as part of the go live preparations. The hospital administrator will then be able to set up other hospital administrators and hospital users. Access to this additional functionality is via an administration tab on the home page. It is recommended that hospitals have at least two administrators set up so that they can re-set one another's accounts if they become locked.

Updating Order Display [back to top]

Hospital Administrators can configure the length of time orders can be seen on the home page pre and post "today's" date. The maximum time in advance that orders can be seen is 14 days and the maximum range from pre to post "today's" date is 15 days. There is a new option to "Update order display" on the administration tab.



Selecting "Update order display" brings up the following screen

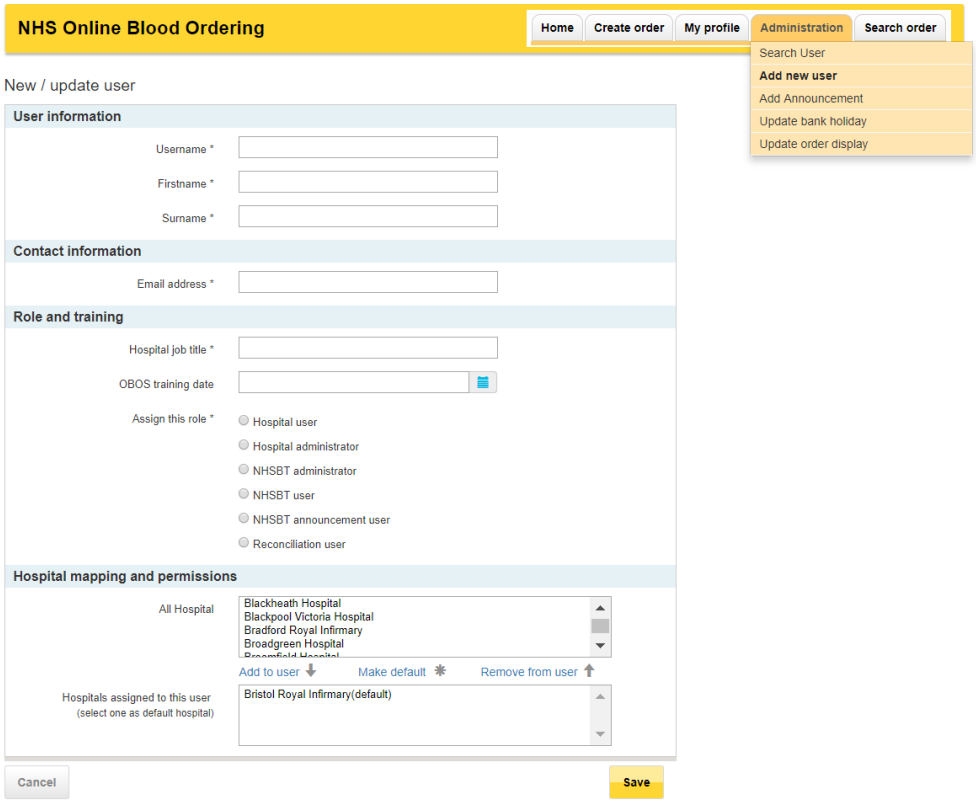


Enter "Days Before" and "Days After" the current date as appropriate. Please note standing orders are sent to Pulse **8 days before the delivery date** and their appearance on the OBOS Home page from this point will be dictated by the local configuration.

Adding new users [back to top]

Select 'Add new user' from the Administration tab and complete the following sections:

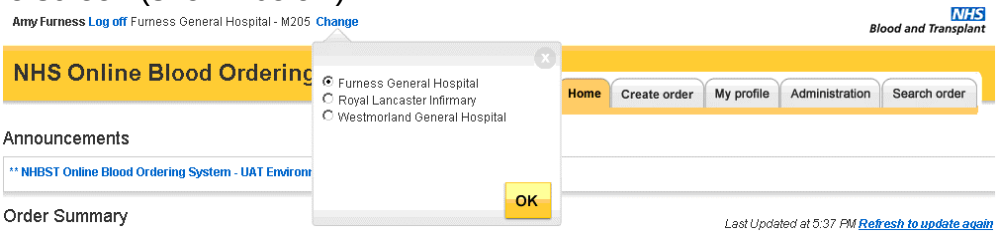
User information,
Contact information,
Role and training. Assign role of hospital user, hospital administrator or Reconciliation user.



A list of hospitals that can be assigned to this user will appear in 'Hospital mapping and permissions' This will include all hospitals that the administrator has access to. Highlight the required hospital and add to user.

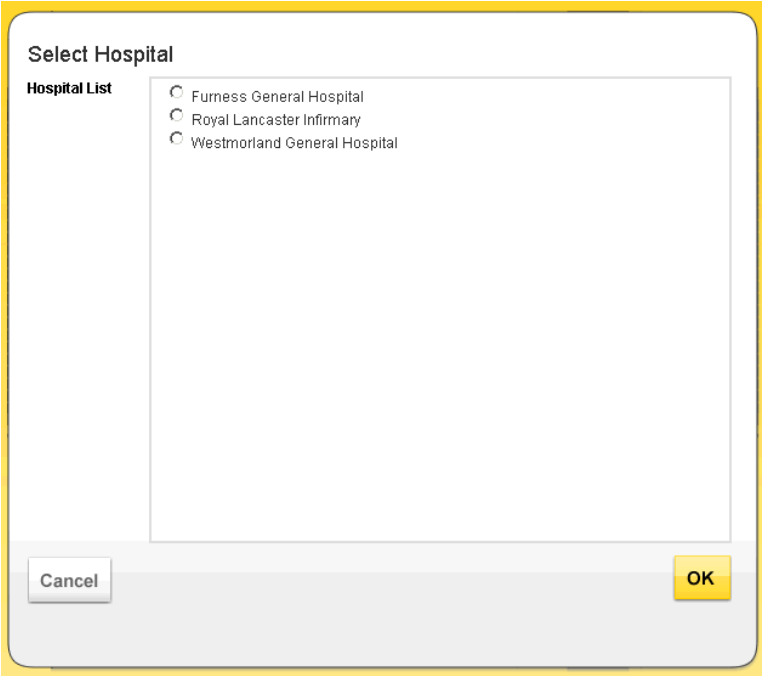
The first hospital added to the user will be the default hospital the user will access when first logging in. If multiple hospitals are added the default hospital can be changed by highlighting the required hospital and clicking 'make default '

To access the other hospitals available to them they will need to click on change in blue at the top of the screen (shown below).



If you do not want any hospital to be set as default then after adding all the required sites, highlight the hospital showing as “(default)” and remove from user.
Highlight the hospital that was removed in the “All Hospital” box and add back to user.

If no default hospital is entered, then at logging the first screen the user will be shown a screen asking them to select the hospital they wish to see and order for (shown below).

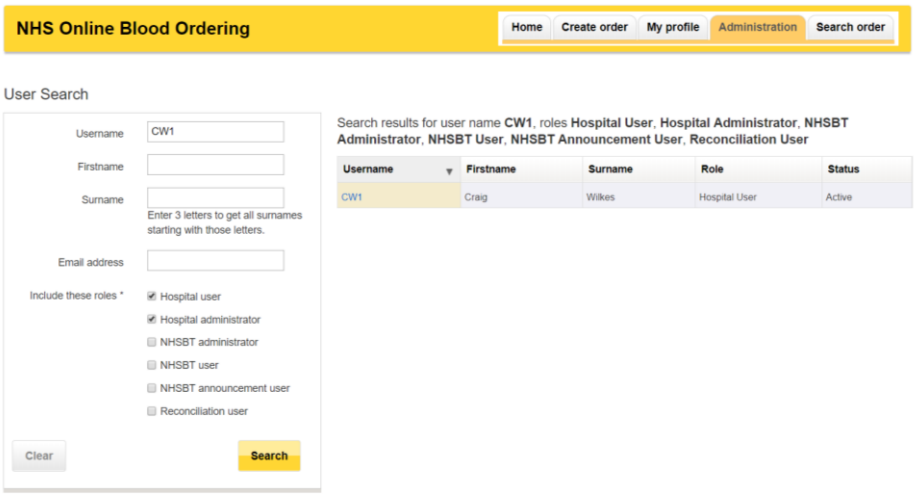


Once all details have been entered, save and a message will be displayed to say that the user was successfully created.

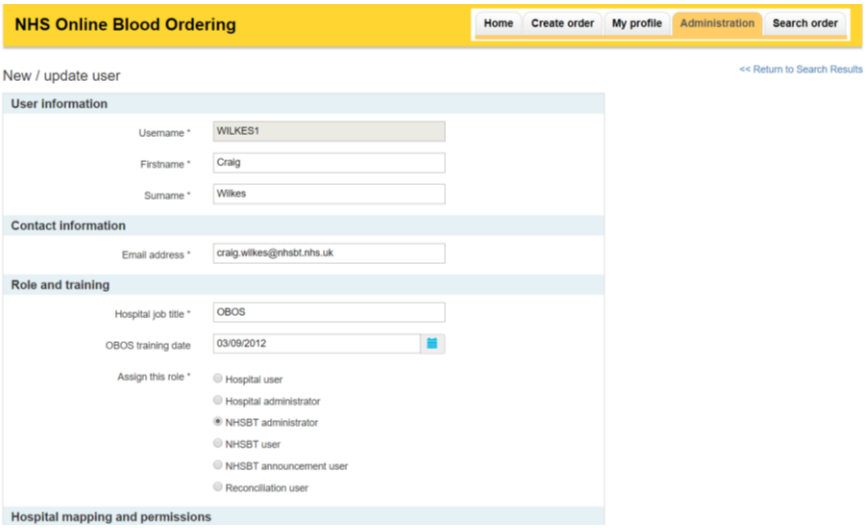
Searching for users [back to top]

By selecting search user from the administration tab, the screen shown below can be accessed.
Users can be searched for by username, first name, full/first 3 letters of surname or e-mail address.
Leaving the above details blank and selecting “Hospital user” and/or “Hospital administrator” will show all accounts for the hospital selected.

The NHSBT administrator, user and announcement user searches are greyed out for hospital administrators.



The user’s information screen can be opened for editing by clicking on the username in the search results on the right-hand side of the screen. This opens the New/update user screen shown below. There is an option to “Return to Search Results” on the right-hand side. Information can be edited and then saved by clicking on ‘save’ at the bottom of the New/ updated user screen.

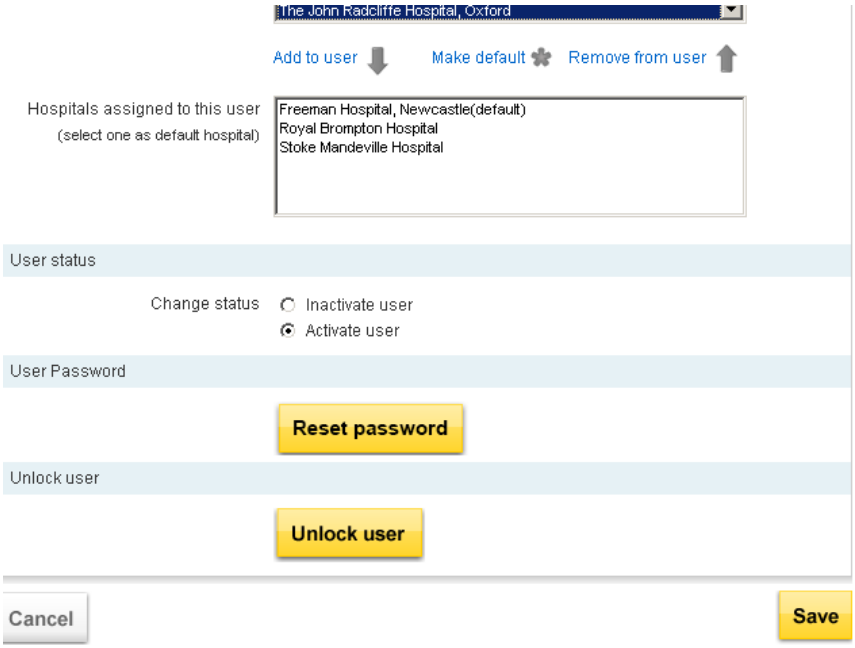


Activating/Inactivating accounts and resetting passwords. [back to top]

At the bottom of the new/update user screen shown below there is an option to inactivate or activate users, to reset a user's password and to unlock a user who has locked themselves out of the system. Make the changes required and click on the relevant 'reset' 'unlock' or 'save' buttons to make the changes.

Please note it is important to inactivate accounts when a member of staff leaves or retires.

A username can never be deleted from the system because you need to maintain the audit of "who did what and when" but you should prevent staff who no longer work for you ordering on your behalf.



Automatic deactivation of accounts

If an account has not been accessed for 9 months, it will automatically be deactivated. Users will receive prior email notification giving them the option to log in to the account to stop it being deactivated.

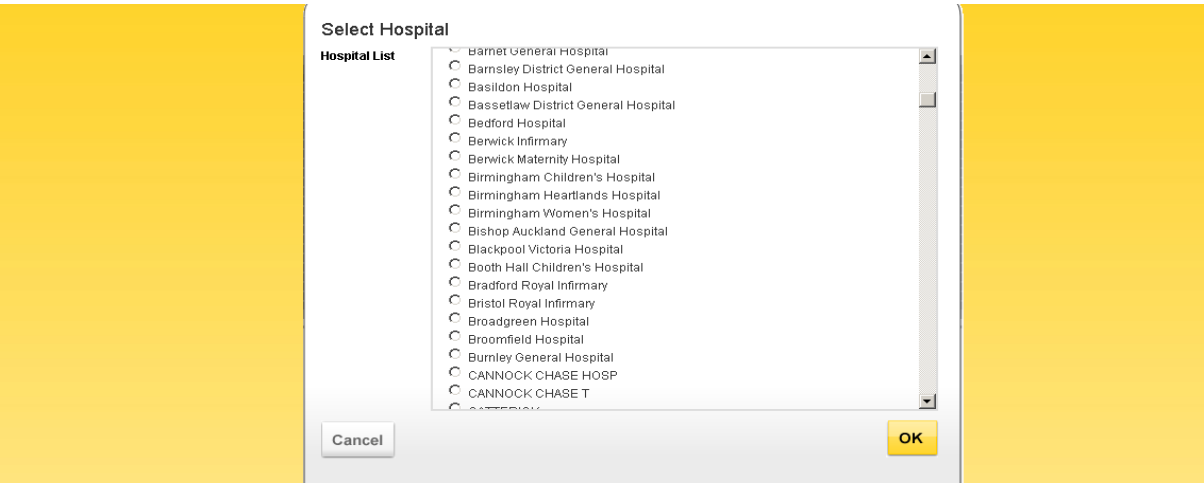
These accounts can be reactivated by any user with administrator level access.

NHSBT administrators [back to top]

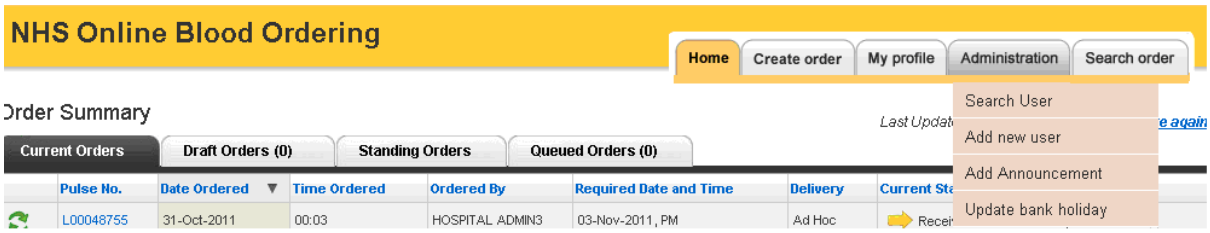
There are three levels of administration role within NHSBT:
'NHSBT administrator' is an overview role limited to only one or two key NHSBT staff. 'NHSBT users' can set up new accounts for hospital staff, unlock users, reset passwords, and add bank

holidays and announcements. 'NHSBT announcement user' can update the announcement message only.

At login, NHSBT administrators and NHSBT users will be provided with a screen showing all hospitals currently available on OBOS. To add hospital administrators, select the hospital which requires the new administrator to be added. Where the hospital administrator has access to multiple hospital accounts, anyone be selected to set up the account.



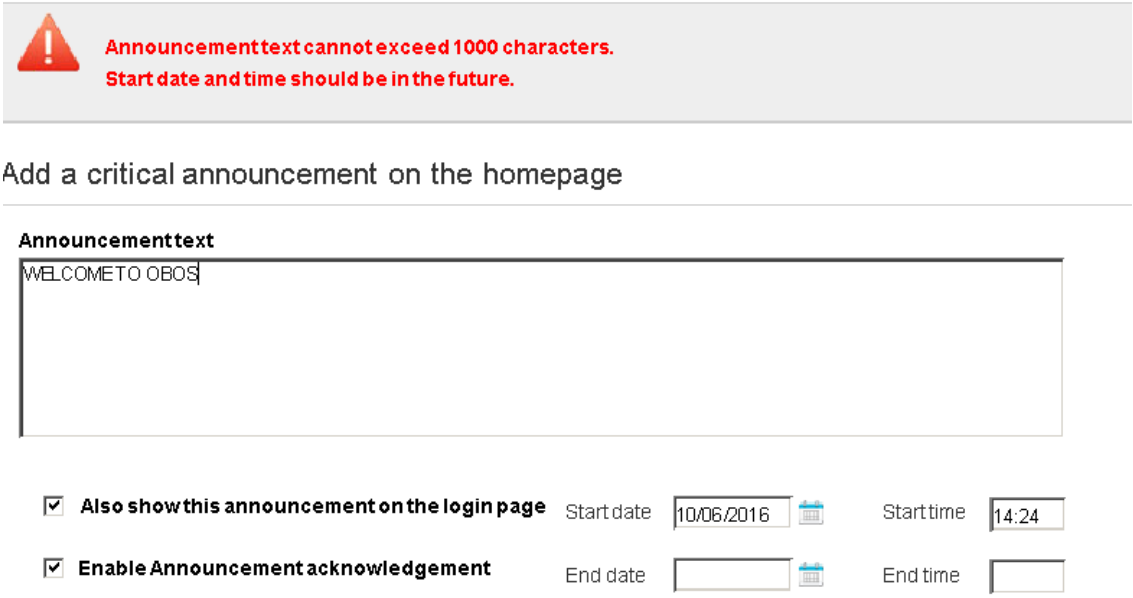
You will be taken to the hospitals home page where you can select from four administration functions shown below. Search user and add new user functionality is the same as described for hospital administrators.



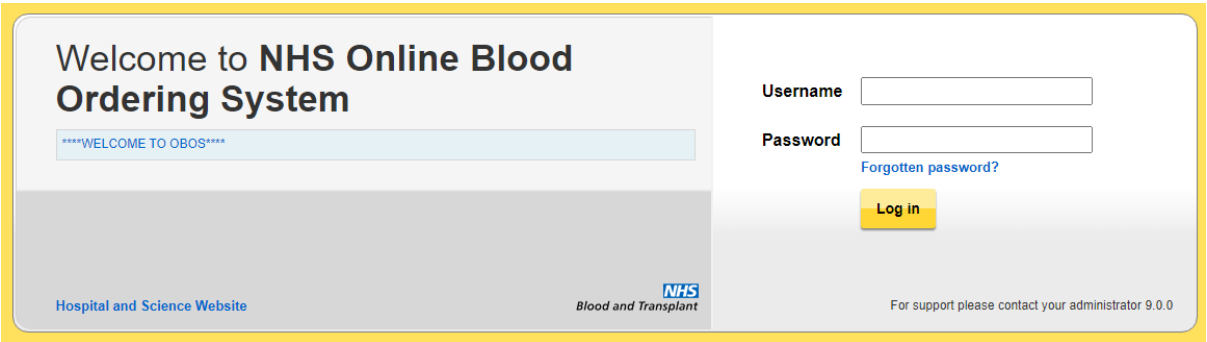
Adding an announcement to OBOS [back to top]

To add an announcement to the log in screen and home page select the 'add announcement option' from the administrator tab. The screen shown below will open. Type the announcement into the announcement text box. Tick the box 'also show this announcement on the homepage'. You can set up announcements so that the first time a user logs in after an announcement has been posted they must acknowledge it. To use this functionality, tick the box 'Enable Announcement Acknowledgement'

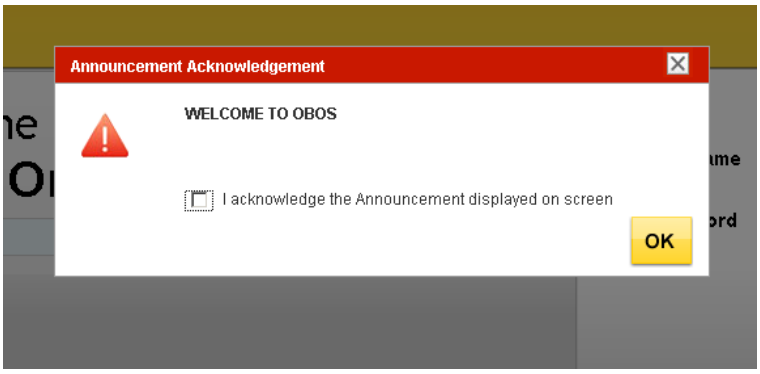
Announcements require a 'Start date/time' and an 'End date/time' Select the required dates using the calendar icon and highlighting the required dates or type the dates into the date boxes in the format dd/mm/yyyy. Time should be entered (using 24-hour clock) as shown below. Announcements cannot exceed 1000 characters; excess will be highlighted when clicking 'Save'



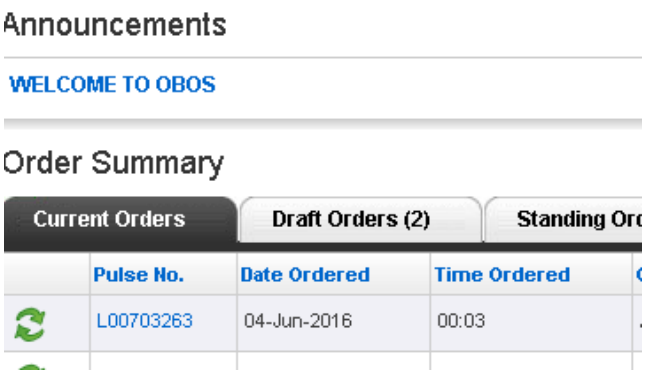
A message confirming the announcement has been saved will be shown. Log out and check that the announcement appears on the login screen:



Log back in. If you have enabled 'announcement acknowledgement' you will see the following screen:

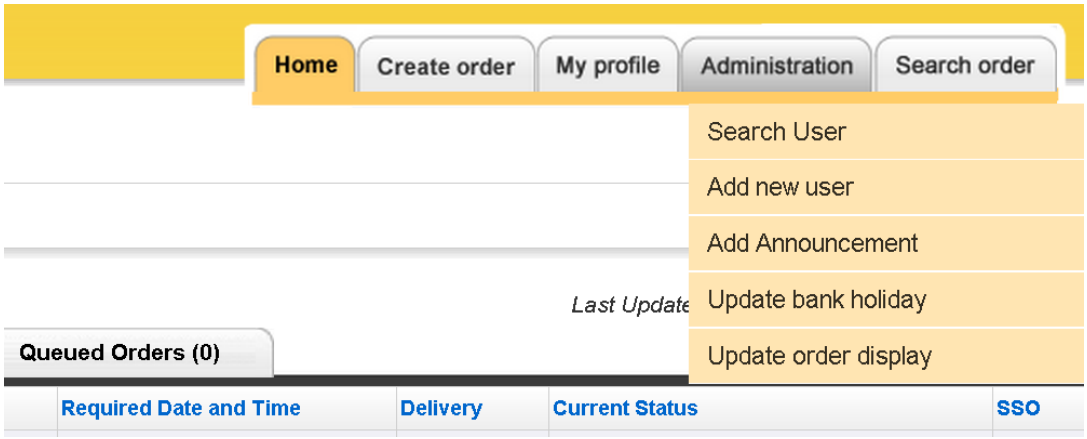


Acknowledge the announcement and then check that it appears on the home page:

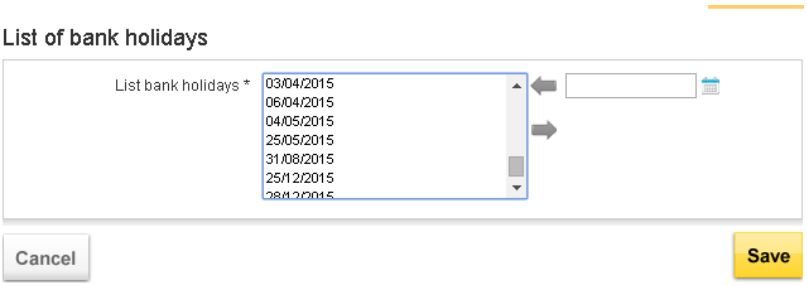


Updating Bank holidays. [back to top]

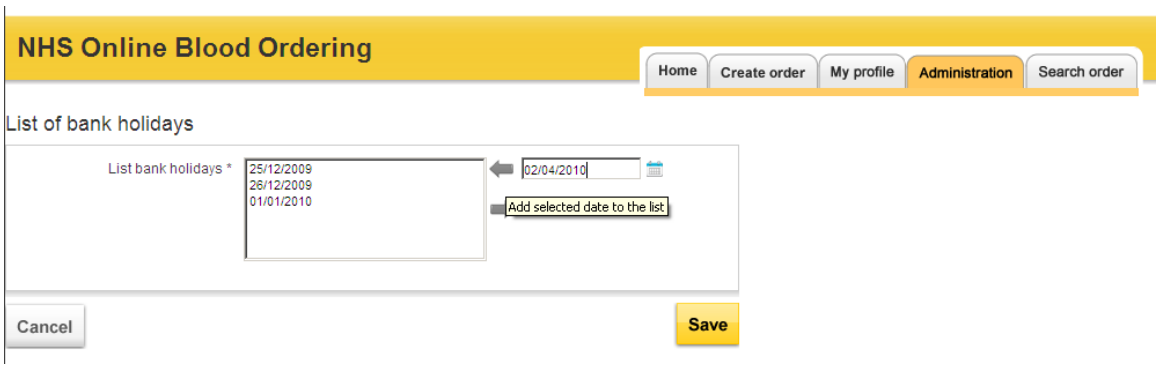
From the home screen administration tab select update bank holidays. This will update the whole system regardless of which hospital you are currently logged into.



A screen showing a list of bank holidays will open.



To add a date to the bank holiday list, use the calendar to highlight the date and the ← arrow to move selected dates into the list bank holidays box as shown below. Any dates which need to be removed can be removed using the → arrow.



Once dates have been updated click on 'save'. A confirmation message will be shown to indicate that the bank holidays have been saved successfully.

Appendix Two [back to top]

Icons used in the OBOS system

Order Status	Icon
Draft	
Pending	
Queued	
Received from OBOS	
Awaiting Allocation	
Part Allocated	
Waiting for issue	
Awaiting patient link (SSO)	
Awaiting assignment (SSO)	
Awaiting authorisation (SSO)	
Awaiting acknowledgement (SSO)	
To be updated by hospital	
Partially issued	
Prepared awaiting dispatch	
Dispatched	
Notification Received	
Locked by another user	
Preparation in progress	
Deleted/Cancelled	
Unfulfilled	

Icons used in the OBOS system

Across the application	Icon
Standing orders	
Linked Order	
Substitution	
Success Message	
Error Message	
Information Message	
Print Order	
Expand Order Line	
Collapse Order Line	
Remove Order Line	
Preview with order form	
Background Processing	
Specialist Stock Order	
VMI Order	
Expand/Collapse Section	
Standing Order(s) due to expire	

Any comments or feedback on the system or this user guide are welcomed as they allow us to continually develop to meet user needs and can be sent to OBOS@nhsbt.nhs.uk